Morgan Stanley

PRIVATE WEALTH MANAGEMENT

Family Office Resources

Solutions that Impact Multiple Generations

Family Office Resources delivers comprehensive solutions across a broad range of complex, multigenerational wealth management issues by providing ultra high net worth clients with specialized knowledge, experience, tools and networking events. The team is comprised of 60+ experienced professionals who work with your Private Wealth Advisor team to best serve you and your family.

Overview of Capabilities

FAMILY OFFICE RESOURCES GENERALISTS help you and your Private Wealth Advisor curate and navigate an expansive suite of specialized resources to address the complex challenges of managing significant wealth and make complicated decisions confidently.

WEALTH & ESTATE PLANNING STRATEGIES
educate you on various tax, trust, and estate strategies, help facilitate the implementation of those strategies, and focus on the integration of those strategies with your investment plans.

FAMILY GOVERNANCE
helps you maximize the value of your family capital through the transfer and preservation of your family's shared values, and the creation of an enduring family legacy.

WEALTH EDUCATION
works alongside you and your family to develop a customized financial education curriculum based on each of your family members' goals and aspirations, existing knowledge, and learning styles.

PHILANTHROPY MANAGEMENT
supports you by offering a suite of advisory services and giving platforms, including Morgan Stanley's donor advised fund, to help define and realize your family's charitable mission.

LIFESTYLE ADVISORY
provides you with customized solutions through industry-leading, third-party providers (e.g., aircraft, cybersecurity, etc.) that help meet your exceptional needs, from the everyday to the extraordinary.

TRUST SERVICES
provides you with the access and ability to select an appropriate third-party corporate trustee through an "open architecture" trustee platform.

HEALTH AND WELLNESS EDUCATION
provides you with educational content and thought leadership, concierge support, and connectivity to healthcare and wellness centers of excellence.

SINGLE FAMILY OFFICE ADVISORY
offers you customized resources and advisory services for your existing or prospective single family office, including exclusive experiences, proprietary content, and select referral services.

RELATED CAPABILITIES include investment, insurance, and other risk management solutions, institutional family office services, art resources, cash management and lending products and services, and corporate equity solutions.

For additional information, or to schedule a consultation, contact your Morgan Stanley Private Wealth Advisor.

CRC 6060805 11/23 CS 1003624-4121250 01/24