

Morgan Stanley



Introduction to Retirement

Helping you optimize retirement plan outcomes.

At Morgan Stanley, our comprehensive retirement solutions can help your business provide and support retirement programs that are aligned with your organization's strategic goals. With a wide array of products and services to support companies of all sizes and various retirement plan objectives, we can help you effectively improve and customize your employees' benefits, so your employees can make the most out of retirement.

Education Programs

When you engage Morgan Stanley for retirement plan consulting, you offer your employees a valuable resource—access to a Morgan Stanley Financial Advisor. Your Financial Advisor can work with you to design and implement financial education programs that help meet your employees' needs, including a blended program of digital, multimedia content, and in-person education and planning sessions.

Turnkey Solutions

Many business owners may not have the time or resources to dedicate to their retirement plan. Morgan Stanley has developed multiple turnkey solutions that help lower your fiduciary risk, reduce administration, and, in many cases, lower costs for you, the employer.

Investment Management

Several of Morgan Stanley's solutions include investment options and lineups built and evaluated by the Global Investment Office (GIO) team, who can help remove the guesswork and guide your fund lineup investment direction, selection and monitoring while helping you mitigate risk as a plan fiduciary.

Dedicated Support

Morgan Stanley has been providing retirement plan services to clients for over 20 years. Our dedicated retirement team, supported by product, service, and support professionals, pride themselves on helping businesses – from startups to billion-dollar, multinational firms – achieve their retirement plan goals.

Do I need to switch my current recordkeeper?

In many cases you can continue to work with your current recordkeeper and use Morgan Stanley as the investment professional for your plan.

What types of retirement plans do you support?

Morgan Stanley can service plans of all sizes and types including but not limited to Defined Contribution 401(k) Plans, Defined Benefit Plans and Deferred Compensation Plans.

To learn more about our retirement plan solutions and how we can help your business, contact your Morgan Stanley Financial Advisor.

The Global Investment Manager Analysis team uses a disciplined process to evaluate investment managers and products for Morgan Stanley's investment advisory programs. This dedicated team of more than 70 investment analysts regularly reviews 2,100 investment products across a broad spectrum of asset classes and investment styles in an effort to ensure that they continue to meet our rigorous standards.

Please see the applicable Morgan Stanley Smith Barney LLC ADV Brochure for more information for any of the advisory programs discussed in this brochure. The ADV Brochure is available from your Financial Advisor or online at www.morganstanley.com/ADV.

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