

# Morgan Stanley

## Second-Opinion Service

*Exclusively for friends, family and associates of our valued clients*



You probably know a friend, family member or colleague who may be in a complex situation, have anxiety about what's ahead, or just unhappy with the advice from his or her financial advisor. We've seen firsthand that a second opinion can uncover possibilities, point out risks, or reiterate that they're on the right track.

In order to help the people you care about achieve their financial goals, we have created a complimentary second-opinion service. We're pleased to offer your friends, family members and associates skilled focus and guidance utilizing the entire suite of Morgan Stanley's Wealth Management Capabilities. No cost, no commitments.

### What to expect from our second-opinion service

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they will receive a personalized analysis of their current situation.

### Second-opinion service



#### Andrew M. Plocker, CDFIA®

Executive Director  
Portfolio Management Director  
Alternative Investment Director  
Financial Planning Specialist  
Financial Advisor  
NMLS #1331965  
CA insurance # 4354892

111 S. Pfingsten Rd. Ste. 200  
Deerfield, IL 60015  
Direct 847-480-5467  
Toll Free 800-543-3623  
andrew.m.plocker@morganstanley.com  
Visit My Website at:  
<https://advisor.morganstanley.com/andrew.m.plocker>



The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives.

Morgan Stanley and its Financial Advisors do not provide tax or legal advice. Individuals should seek advice based on their particular circumstances from an independent tax or legal advisor.

The use of the CDFIA designation does not permit the rendering of legal advice by Morgan Stanley or its Financial Advisors which may only be done by a licensed attorney. The CDFIA designation is not intended to imply that either Morgan Stanley or its Financial Advisors are acting as experts in this field.