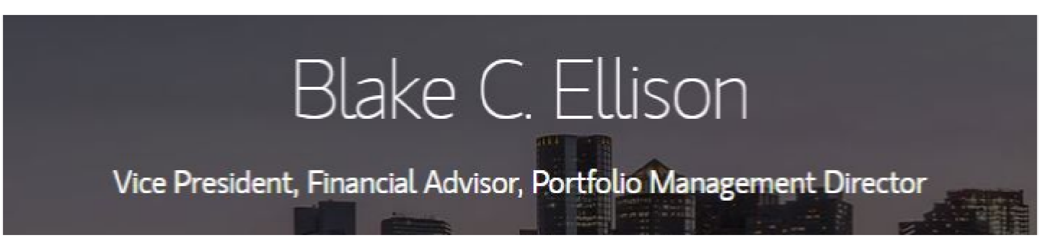
Morgan Stanley   Wealth Management



July Newsletter

[Client Preferred Name]

I hope your summer has been enjoyable so far. As we welcome in July, I wanted to share a few key market insights along with timely best practices to help you stay informed and empowered on your financial journey.

On a personal note, my oldest Son Cole graduated magna cum laude from Fairfield University with a finance degree and has recently started his career. My daughter Sage is transferring to University of Tennessee as a junior and I will be moving her in the first week of August. My youngest son, Storm has been playing for a national club baseball team all summer while trying to figure out his college commitment plans as he enters his senior year of high school.

As always, if you have any questions or would like to discuss any of these insights further, please do not hesitate to reach out.

Featured Updates and Resources

Social Security Mailed-Payments Stopping!

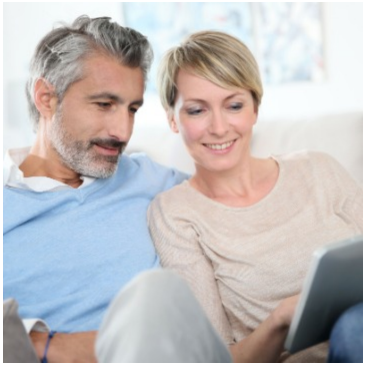
Starting September 30, 2025, the Social Security Administration (SSA) will no longer issue paper checks. If you receive SSI, SSDI, or retirement benefits, you'll need to receive payments electronically

Register for Direct Deposit

The Big Beautiful Bill Cheat Sheet

The new bill passed in congress this month casts a wide net in how it will effect various parts of the nation. Check out this breakdown of the bill and how it might affect you.

Read More



Your Mid-Year Financial Planning Checklist

Changes in the market or shifts in your personal circumstances may require adjustments to your financial plan. Here's a mid-year checklist to help get you started.

Read More

The Robots Are Coming

Adam Jonas, Morgan Stanley's Head of Global Autos and Shared Mobility Research, discusses the fast transition of artificial intelligence into the physical world in the form of humanoid robots.

Read More

CLIENT RESOURCES

Explore your exclusive Morgan Stanley resources

Morgan Stanley Investor Insights

Morgan Stanley's latest updates on markets, economies, global trends and more.

Discover Our Insights

Thoughts on The Market Podcast

Short, thoughtful takes on recent events in the markets, every weekday from a variety of perspectives within Morgan Stanley

Listen Here

Next Gen Wealth Education Seminar

Join our webinar on August 4th to learn how to best navigate the challenges of estate planning for you and your loved ones - both young and old.

Register Here

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