Morgan Stanley | Wealth Management

Blake C. Ellison

Vice President, Financial Advisor, Portfolio Management Director

Review My Account | Thoughts on the Market | Previous Newsletters

September Newsletter

As we cool down from a blistering summer, the month of September allows us to continue our progress on gearing up for year-end. Please see below for a few exciting team updates and some additional thoughts to consider as we enter Q4.

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Organizational Announcements & Milestones

Ashley is Joining the Team!

Cole Passed His SIE Exam!

Anna is Retiring!

We have some exciting news and a few bittersweet changes within our team this month. First, on a personal note, we're proud to announce that my son, Cole, has successfully passed his Securities Industry Essentials (SIE) exam, marking a significant step in his professional journey. We couldn't be happier for him! He is back finishing his senior year as a finance major at the Dolan School of Business at Fairfield University.

On a more bittersweet note, our esteemed Senior Client Service Associate, Anna Halton-Yaschur, will be retiring this September. Anna has been an invaluable part of our team, and her dedication and warmth will be deeply missed. We wish her all the best as she transitions to a new phase of her life in Key West, Florida.

Lastly, we're thrilled to welcome Ashley Casucci, who will be joining us as a new Client Service Associate. Ashley holds a Masters of Science from Northeastern University and a Bachelors of Music from Boston University. She resides in Hopkinton with her husband and three children. We are excited to have her fresh perspective and wealth of enthusiasm, and we're confident she'll be a great addition to our close-knit team.

Thank you for your continued trust and support as we navigate these transitions. We look forward to hearing from you soon!

Featured Updates and Resources

Tax Policy and Your Portfolio

As the 2024 U.S. election nears, potential tax-policy changes could affect your portfolio and finances. Here are key questions answered.

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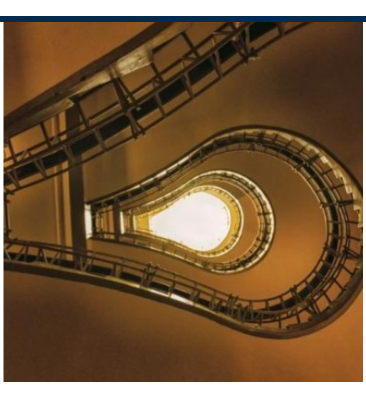

Elections, the Economy, and the Markets

Elections can be noisy. As November comes increasingly into focus, the charts below can provide historical context for the current landscape. Take a look!

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Helping Students Stay Cybersafe in College

As your student prepares for college, it's important to consider the security of their devices and information. This article provides steps to help students stay safe online. As always, let me know how I can help.

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Back to School Guide 2024: 12 Tips for Parents and Kids

The long-awaited time of the year is here — back to school season! As summer vacation draws to a close, it's time for parents and kids alike to prepare for the upcoming school year. While the return to school brings excitement and new opportunities, it also comes with its own set of challenges. As parents, it is essential to ensure that our children are well-prepared and ready for the academic journey ahead.

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INVITATION: Wealth Education for the Next Gen | Estate Planning 101: Basics including How to Be a Trust Beneficiary

Monday, October 7, 4:00 p.m. ET

Join us on a session on the fundamentals of estate planning, a strategy designed to help protect, manage and distribute assets both during and after your lifetime. This session will feature our in-house experienced professionals that will speak about preserving your legacy while ensuring the well-being of your loved ones to leave a lasting impact.

Learn More & Register

On the Markets: September 2024

Sticking the Landing

With a soft landing likely imminent, look for near-term opportunities across equities and credit and longer-term structural plays in tech and health care. Find out more in On the Markets. This publication summarizes the Global Investment Committee's market outlook and contains thought-provoking essays that examine the forces shaping the investment landscape.

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