



March 2026 Newsletter

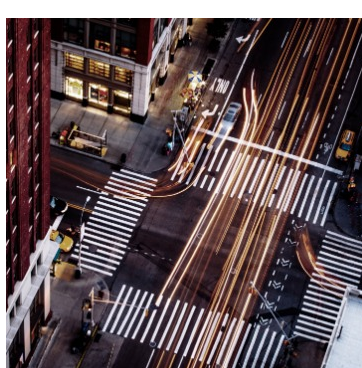
Carlos Duque, First Vice President, Financial Advisor at Morgan Stanley

This month marks a personal milestone for me—15 years at Morgan Stanley. I'm grateful for the opportunity to build long-term relationships with you and to support families, professionals, and business owners as they navigate important financial decisions.

Thank you for your trust and continued relationship. I'm also appreciative of the colleagues and teams who support our work behind the scenes each day. I'm proud of what we've accomplished together and look forward to the years ahead.



March Insights



On The Markets: *Exploiting Rotation's Excesses*

Amid a headline-heavy month, AI disruption stole the show. For more detail on how AI is impacting equities and credit, see the March edition of On the Markets

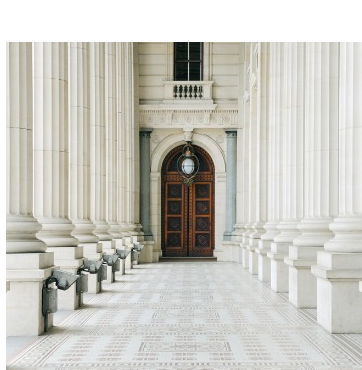
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Protecting Yourself From Tax Season Scams

While you're busy gathering your paperwork for tax season, cybercriminals are devising schemes to steal your identity and money. Know how to protect yourself and your loved ones.

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US Policy Pulse: *Pricing the Politics of Power*

In this report, we discuss energy needs across the US, private and public sector drivers, and the impact of the evolving energy narrative on markets and the economy.

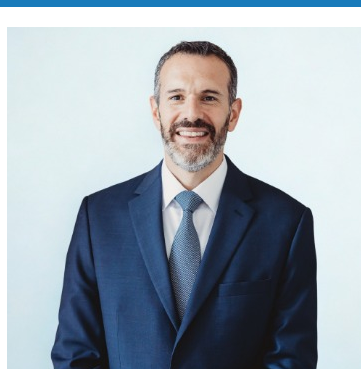
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The Vista Group

at Morgan Stanley

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Carlos Duque, CFP®

[Connect on LinkedIn](#)

First Vice President, Financial Advisor,
Certified Financial Planner™, Insurance Planning
Director, Financial Planning Specialist

[Contact Carlos](#)



Mitch Vigil, CFP®

[Connect On LinkedIn](#)

Senior Vice President, Wealth Management,
Financial Advisor, Portfolio Management Director

[Contact Mitch](#)



John Rochester, QPFC

[Connect On LinkedIn](#)

Senior Vice President, Wealth Advisor,
Senior Investment Management Consultant,
Alternative Investments Director,
Senior Portfolio Management Director

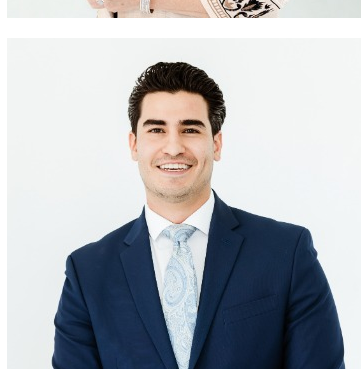
[Contact John](#)



Cindy Snapka

Client Service Associate

[Contact Cindy](#)



Eric Oquedo

Client Service Associate

[Contact Eric](#)

2026 Forbes Best-In-State Wealth Management Teams

Source: Forbes (Awarded Jan 2026) Data compiled by SHOOK Research LLC based for the period 3/31/24-3/31/25. [Awards Disclosures](#) | [Morgan Stanley](#)

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2000 Westchester Avenue, Purchase, NY 10577-2530 USA

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