



Morgan Stanley

## Carolina Silva

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Workplace Advisor - Equity Compensation

Morgan Stanley Wealth Management

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[Website](#) | [Schedule a Meeting](#)

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# Contents

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[About Carolina](#)

---

[In the Press](#)

---

[Featured Speaker](#)

---

[Social Media](#)

---

[Speaking Topics](#)

---

[Leadership, Awards, & Recognition](#)

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# Carolina Silva

## Financial Advisor

Carolina Silva, she/her, is a **financial advisor and an experienced speaker** with a decade of experience in the financial services industry. She runs a wealth management practice for high-net-worth individuals. **The majority of Carolina's clients are diverse**, as her practice focuses on communities like her own, **serving Women, Latinos, and the LGBTQ+ community and allies.**

Carolina is passionate about **the future of wealth** representing **first generation wealth** clients helping them **build, grow, and preserve generational wealth.** Carolina believes in **financial empowerment through literacy and education.** She hosts an LGBTQ+ Executive Breakfast Series, Latina Executive Breakfast Series, and Wealth Wednesday Webinar Series, to spread education and awareness on how to help build wealth.

Carolina lives in Brooklyn with her wife, Ashley, a NCAA Division I basketball referee working for the NBA as an NBA Referee Trainee, and their two rescue dogs, Sofia and Tinto.





# In the Press

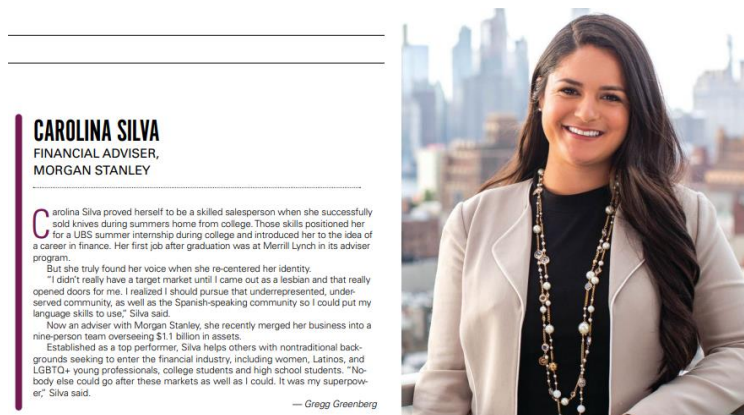
SKIMM MONEY · JUNE 9, 2023

## Skimm Money: Cheap Flights, LGBTQ+ Financial Planning, and the Summer Slump

Free Advice From...



Happy [Pride](#). To learn more about how financial planning may look different for LGBTQ+ folks, we tapped [Carolina Silva](#), a financial advisor at Morgan Stanley who works with BIPOC, LGBTQ+, and female clients. Ahead, she explains how family dynamics and health care can impact LGBTQ folks' personal finances. Plus, she shares her tips for how to build wealth.



Left: theSkimm, June 2023, [LGBTQ+ Financial Planning](#)

Bottom Center: Investment News, November 2022, [Woman to Watch Rising Star Award](#)

Top Right: Morgan Stanley, June 2021, [Woman Without Limits Feature](#)

INVESTMENT NEWS WOMEN TO WATCH RISING STAR

Source: INVESTMENT NEWS (Awarded NOVEMBER 2022) Data compiled by INVESTMENT NEWS based on time period from 06/15/2022 – 08/19/2022. For criteria & methodology, go to (<https://bit.ly/3W8ohER>)

# Featured Speaker



## Companies

- Apollo
- Citi
- CNBC
- HelloFresh
- Morgan Stanley
- Nasdaq
- Northwell Health
- Standard Chartered
- SUMA Wealth
- Tiffany & Co
- Willkie Farr & Gallagher

## Non-Profit Organizations

- ALPFA
- Girl Scouts of America
- Girls Who Code
- New York Junior League
- OPEN Finance
- Out Leadership
- Out for Undergrad
- StartOut



## Conferences

- ALPFA Convention, 2022 & 2023
- Lesbians Who Tech Summit, 2023
- Modern Healthcare's Women Leaders in Healthcare Conference, 2021
- OPEN Finance Forum, 2022 & 2023



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PROUD SPONSOR OF THE 2023 ALPFA CONVENTION

**Let's Talk: Salary Transparency! Empowering Women of ALPFA Leaders to Negotiation**

Wednesday, August 23rd, 2023  
8:30 a.m. - 9:30 a.m.

**SPEAKER**  
**CAROLINA SILVA**  
Financial Advisor  
Morgan Stanley



**SAN FRANCISCO SUMMIT 2023**  
VIRTUAL OCT 16-17  
IN-PERSON OCT 18-20  
10TH ANNIVERSARY

**CAROLINA SILVA**  
Financial Advisor, Morgan Stanley

lesbianswhotech.org

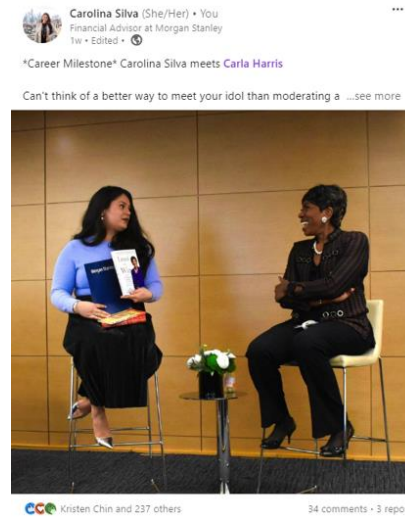




# Social Media

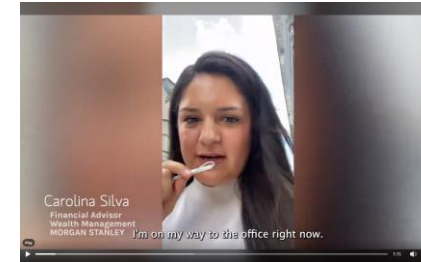
## LinkedIn

Select icons to view



## Commute with Carolina Video Series

Introduction to Commute with Carolina



Fundamentals of Financial Planning



The Psychology of Money



Day in the Life of a Financial Advisor



# Speaking Topics

The following topics are frequent requests from companies, organizations, and conferences. If there is a specific topic you'd like to see, please let us know.

## Diversity

**Hispanic & Latino** | Financial strategies unique to the Hispanic and Latino community.

**LGBTQ+** | Financial strategies unique to the LGBTQ+ community.

**Women** | Financial strategies unique to women in all stages of life.

## Personal Finance & Financial Planning

**Adulting 101** | The fundamentals of building your wealth. From budgeting, saving, investing, and rent vs. buy.

**Budgeting 101** | The fundamentals of building your budget.

**Caregiving: Financial Considerations** | How to prepare your financial household for caregiving.

**Credit & Debt Management** | The fundamentals of managing your credit and debt.

**Home Buying** | The fundamentals of the home buying process.

**Navigating Divorce** | How to prepare your financial picture for and through divorce.

**Navigating Sudden Wealth** | How to prepare your finances for sudden wealth.

**Psychology of Money** | Your feelings, emotions, and mindset around building wealth.

## Wealth Management

**Charitable Giving** | The fundamentals of philanthropic giving.

**Entrepreneurship** | Growing and exiting your business.

**Equity Compensation 101** | The fundamentals of optimizing your equity compensation.

## Investment Management

**Alternative Investments 101** | The fundamentals of investing in non-traditional assets like private credit, private equity, and private real estate.

**Investing 101** | The fundamentals of investing in traditional assets like equities, fixed income, and cash. Explores the importance of asset allocation and diversification.

**Investing with Impact** | The fundamentals of investing thematically – environment, social, governance.







## Awards & Recognitions

- Investment News, Woman to Watch, Rising Star Award, 2022
- Forbes Best-In-State Wealth Management Team 2023, 2024
- Morgan Stanley Pacesetter 2022, 2023, 2024
- Wagner College Women Who Inspire, 2018



## Executive Breakfast Series

Carolina hosts affinity based Executive Breakfast Series at Morgan Stanley's Global Headquarters in Times Square in New York City. These breakfasts cover educational topics around wealth management and the financial unique planning needs of each community.

[Latina Executive Breakfasts](#)

[LGBTQ+ Executive Breakfast](#)

[Women Executive Breakfasts](#)



## Leadership & Advocacy

- Co-Chair [OPEN Finance](#)
- Co-Chair, Morgan Stanley [ALPFA](#)
- Co-Chair, Morgan Stanley Pride & Ally Network's Client Advisory Group
- Chair, Morgan Stanley Pride & Ally Network's LBT Committee
- Board of Trustee, Wagner College



## Wealth Wednesday Webinar Series

Carolina hosts a Wealth Wednesday Webinar series exploring topics like Investing 101, Psychology of Money, and Home Buying.

[Learn more about the webinar series](#)

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Forbes Disclosure:

Source: Forbes.com (Jan 2024) 2024 Forbes Best-In-State Wealth Management Teams ranking awarded in 2024. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period from 3/31/22–3/31/23.



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