



Morgan Stanley

Carolina Silva

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Workplace Advisor - Equity Compensation

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

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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**.

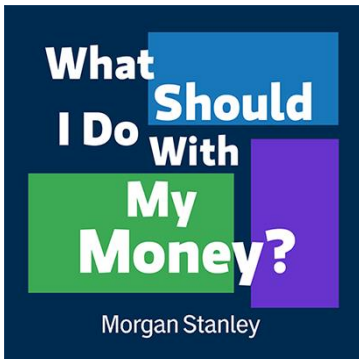
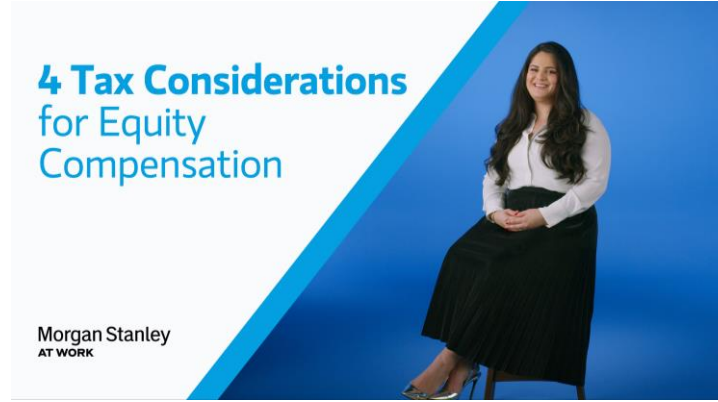
Carolina is passionate about **the future of wealth** representing **first generation wealth** clients helping them **build, grow, and preserve generational wealth**. Carolina believes in **financial empowerment through literacy and education**. She hosts an LGBTQ+ Executive Breakfast Series, Latina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

Carolina is the creator of **Wealth in Action**, a financial education newsletter that translates complex wealth strategies into clear, actionable insights. Her insights bridge Wall Street expertise with real life accessibility – making wealth strategy actionable, relatable, and culturally relevant.

Carolina lives in Brooklyn with her wife, Ashley, an NBA G League and NCAA Division I basketball referee, and their two rescue dogs, Sofia and Tinto.



Morgan Stanley Thought Leader



Top Left: Morgan Stanley, June 2021, Woman Without Limits Feature

Middle Left: Morgan Stanley, June 2023, Power of the Athlete's Mindset

Bottom Left: Morgan Stanley, September 2025, What Should I Do with My Money Podcast

Top Right: Morgan Stanley at Work, June 2025, Equity Compensation

Middle Right: Morgan Stanley at Work, June 2025, HSAs



In the Press

Investment News

November 2022

Woman to Watch Rising Star Award



theSkimm

June 2023

LGBTQ+ Financial Planning

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.

Curve Magazine

April 2026

Curve Power List



Featured Speaker



Companies

- Ally Bank
- Apollo
- Baker Tilly
- BSE Global
- Citi
- CNBC
- HelloFresh
- KPMG
- Morgan Stanley
- Nasdaq
- Northwell Health
- Standard Chartered
- SUMA Wealth
- Tiffany & Co
- Willkie Farr & Gallagher

Non-Profit Organizations

- ALPFA
- Girl Scouts of the USA
- Girls Who Code
- LGBT Bar Association
- New York Junior League
- OPEN Finance
- Out Leadership
- Out for Undergrad
- StartOut



Conferences

- ALPFA Convention (2022-2025)
- OPEN Finance Forum (2022-2025)
- Lesbians Who Tech Summit (2023, 2025)
- Out & Equal Summit (2025)
- Modern Healthcare's Women Leaders in Healthcare Conference (2021)



Morgan Stanley

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

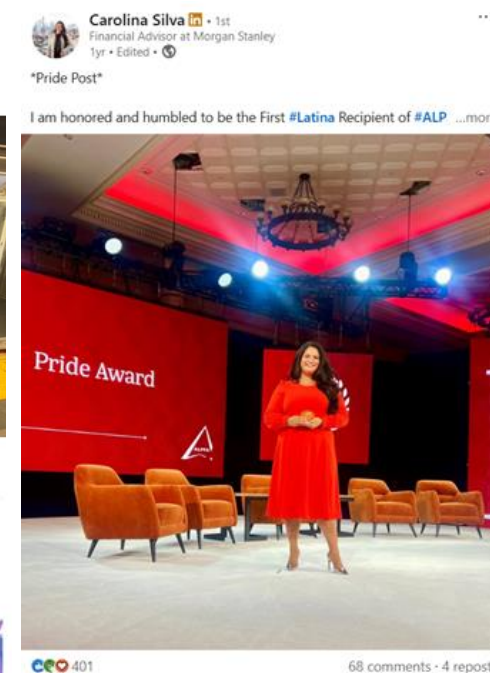
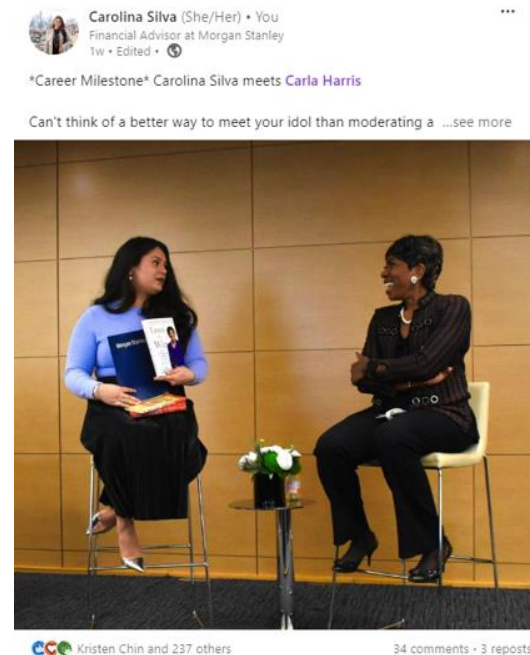
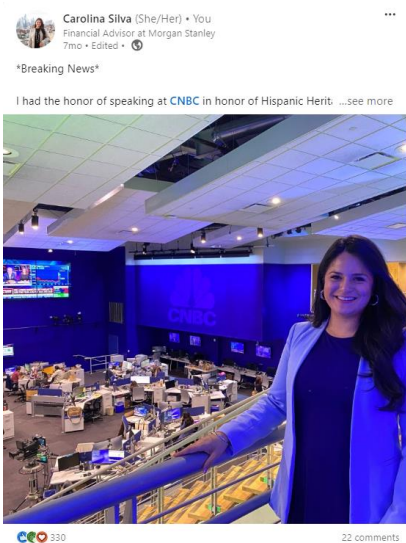


CAROLINA SILVA
Financial Advisor, Morgan Stanley

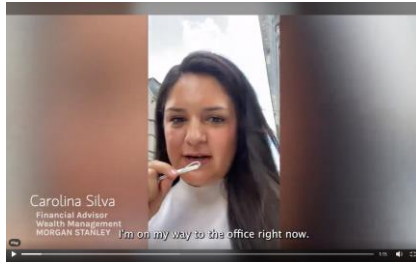
lesbianswhotech.org

Social Media

LinkedIn



Commute with Carolina Video Series



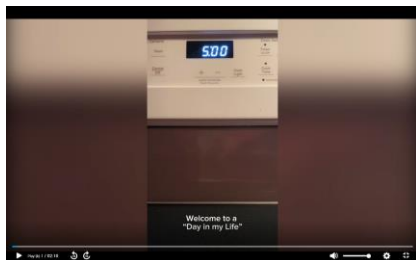
**Introduction to
Commute with
Carolina**



**Fundamentals of
Financial Planning**



**The Psychology of
Money**



**Day in the Life of a
Financial Advisor**



The 50-30-20 Rule



**Financial Personality
Types**



**Working With a
Financial Advisor**



**2025 Financial Ins
and Outs**

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.

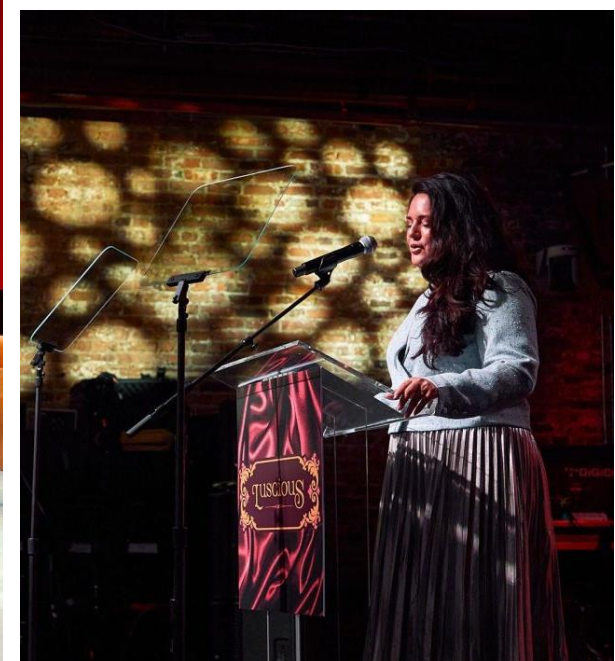
Investing 101 | The fundamentals of investing in traditional assets like equities, fixed income, and cash. Explores the importance of asset allocation and diversification.

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



Awards & Recognitions

Morgan Stanley Pacesetter	2022, 2023, 2024, 2025, 2026
Curve Power List Honoree	2026
Ali Forney Center Honoree	2025
Forbes Best-In-State Wealth Management Team	2023, 2024
ALPFA Pride+ Award	2024
ALPFA Rising Star Award	2024
Investment News, Women to Watch, Rising Star Award	2022
Wagner College Women Who Inspire	2018



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>)

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.

Executive Breakfast Series

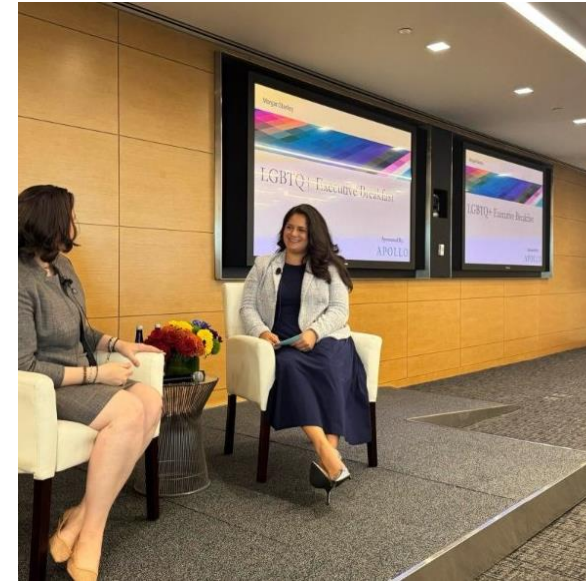
Curated gatherings for executives, founders, and leaders

Venue	Morgan Stanley Global Headquarters, NYC
Format	Invite only gatherings for executives, founders, and leaders
Focus	Wealth Management Strategies
Access	Curated access to decision makers
Audience	Cross-sector & affinity-based gatherings (LGBTQ+, Latinas, Women)
Past Guest Speakers	Lisa Shalett, Morgan Stanley Wealth Management Chief Investment Officer Carla Harris, Senior Client Advisor, Morgan Stanley Sandra Richards, Head of Global Sports & Entertainment, Morgan Stanley Dan Skelly, Head of Market Strategy, Morgan Stanley Wealth Management Monica Guerra, Head of US Policy, Morgan Stanley Wealth Management

[Latina Executive Breakfast](#)

[Women Executive Breakfast](#)

[LGBTQ+ Executive Breakfast](#)



Resources

Wealth Wednesday Webinars



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

[Learn more about the webinar series](#)

Wealth in Action



Wealth In Action

Carolina sends out a monthly newsletter for subscribers passionate about building wealth.

[Learn more about the newsletter series](#)

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Environmental, Social and Governance (“ESG”) investments in a portfolio may experience performance that is lower or higher than a portfolio not employing such practices. Portfolios with ESG restrictions and strategies as well as ESG investments may not be able to take advantage of the same opportunities or market trends as portfolios where ESG criteria is not applied. There are inconsistent ESG definitions and criteria within the industry, as well as multiple ESG ratings providers that provide ESG ratings of the same subject companies and/or securities that vary among the providers. Certain issuers of investments may have differing and inconsistent views concerning ESG criteria where the ESG claims made in offering documents or other literature may overstate ESG impact. ESG designations are as of the date of this material, and no assurance is provided that the underlying assets have maintained or will maintain and such designation or any stated ESG compliance. As a result, it is difficult to compare ESG investment products or to evaluate an ESG investment product in comparison to one that does not focus on ESG. Investors should also independently consider whether the ESG investment product meets their own ESG objectives or criteria.

There is no assurance that an ESG investing strategy or techniques employed will be successful. Past performance is not a guarantee or a dependable measure of future results.

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