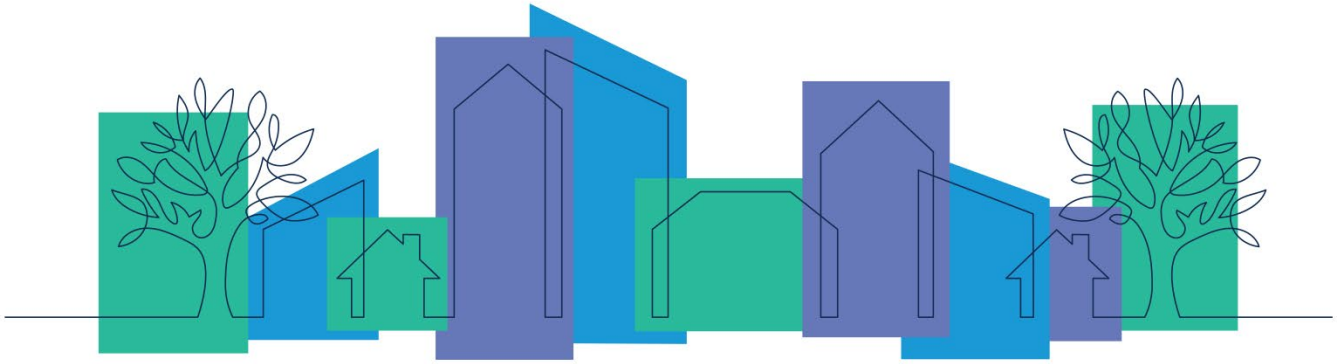
Morgan Stanley

WEALTH MANAGEMENT



How We Give Back

We Are Morgan Stanley | We Are Wealth Management

Community Support

Morgan Stanley Wealth Management is dedicated to putting the needs of both our clients and the community first. We are passionate about creating positive change for the communities where we live and work.

Working with local and national agencies, community groups and non-profit organizations, Wealth Management employees support a range of causes, from caring for the environment to mentoring children.

2022 EMPLOYEE GIVING

$38 million donated by

10K Employees

VOLUNTEERING

Over 10K Employees volunteered

39K Hours as part of the 2023 Global Volunteer Month

SERVING OUR COMMUNITY

Top non-profits supported by Wealth Management:

- Regional and local food banks
- International Rescue Committee
- American Red Cross
- American Cancer Society

Morgan Stanley Foundation

We work to create significant and meaningful impact in the communities where we live and work, with a focus on children's health.

For over 60 years, the Morgan Stanley Foundation has been dedicated to giving children a healthy start to life, supporting diverse communities, and harnessing the time and skills of our employees to make an impact. Our commitment to children's health includes areas of focus on wellness, nutrition, mental health, play, and disaster relief. And, we prioritize diversity, equity and inclusion across all of our programs to work towards ensuring that everyone benefits from our efforts to effect transformative change.

PROVIDE children with a healthy start to life

SUPPORT diverse communities and young people of color to advance equity and inclusion

ENCOURAGE employee volunteering, pro-bono service, and charitable giving

Our work has been guided by the passions, talents and hard work of our employees and we strive to create transformative change in our communities and to inspire our employees towards a lifetime of committed engagement.

$166 Million

Employees, together with the Firm, the Morgan Stanley Foundation and the Morgan Stanley International Foundation, donated nearly $166 million to nonprofits for greater impact in our communities in 2022.

25 Million Children, Families and Educators

The Morgan Stanley Alliance for Children's Mental Health has developed programming addressing mental health challenges reaching 25 million children, families and educators.

27 Playgrounds

Through our partnership with KABOOM!, and with the incredible reach of our local branches, we have created 27 playgrounds and 53 creative play spaces in 67 cities across the country serving over 52,000 children.

356 Million Meals

Our 10-year+ commitment to Feeding America has helped local food banks in every state and city where we have a presence deliver nearly 356 million meals to children and families in need.

13,000+ Babies

We have nursed over 13,000 babies back to good health through our Grow Clinic partners in Boston, Chicago, Houston and Los Angeles.

Morgan Stanley

Our Core Values

Since our founding in 1935, Morgan Stanley has consistently delivered first-class business in a first-class way. Underpinning all that we do are five core values.

> "Long-term and enduring success lies in having a strong culture and talented employees who live our values. At Morgan Stanley, our culture guides our employees, and our values inform everything we do."
> — James P. Gorman, Chairman and CEO

Morgan Stanley Wealth Management is a business of Morgan Stanley Smith Barney LLC.

GIVE BACK

- Serve our communities generously with our expertise, time and money
- Build a better Firm for the future by contributing to our culture
- Develop our talent through mentoring and sponsorship

DO THE RIGHT THING

- Act with integrity
- Think like an owner to create long-term shareholder value
- Value and reward honesty and character

PUT CLIENTS FIRST

- Keep the client's interests first
- Work with colleagues to deliver the best of the firm to every client
- Listen to what the client is saying and needs

LEAD WITH EXCEPTIONAL IDEAS

- Win by breaking new ground
- Leverage different perspectives to gain new insight
- Drive innovation
- Be vigilant about what we can do better

COMMITMENT TO DIVERSITY AND INCLUSION

- Value individual and cultural differences as a defining strength
- Champion an environment where all employees feel a sense of belonging — are heard, seen and respected
- Expect everyone to challenge behavior counter to our culture of inclusion
- Attract, develop and retain talent reflecting the full diversity of society

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