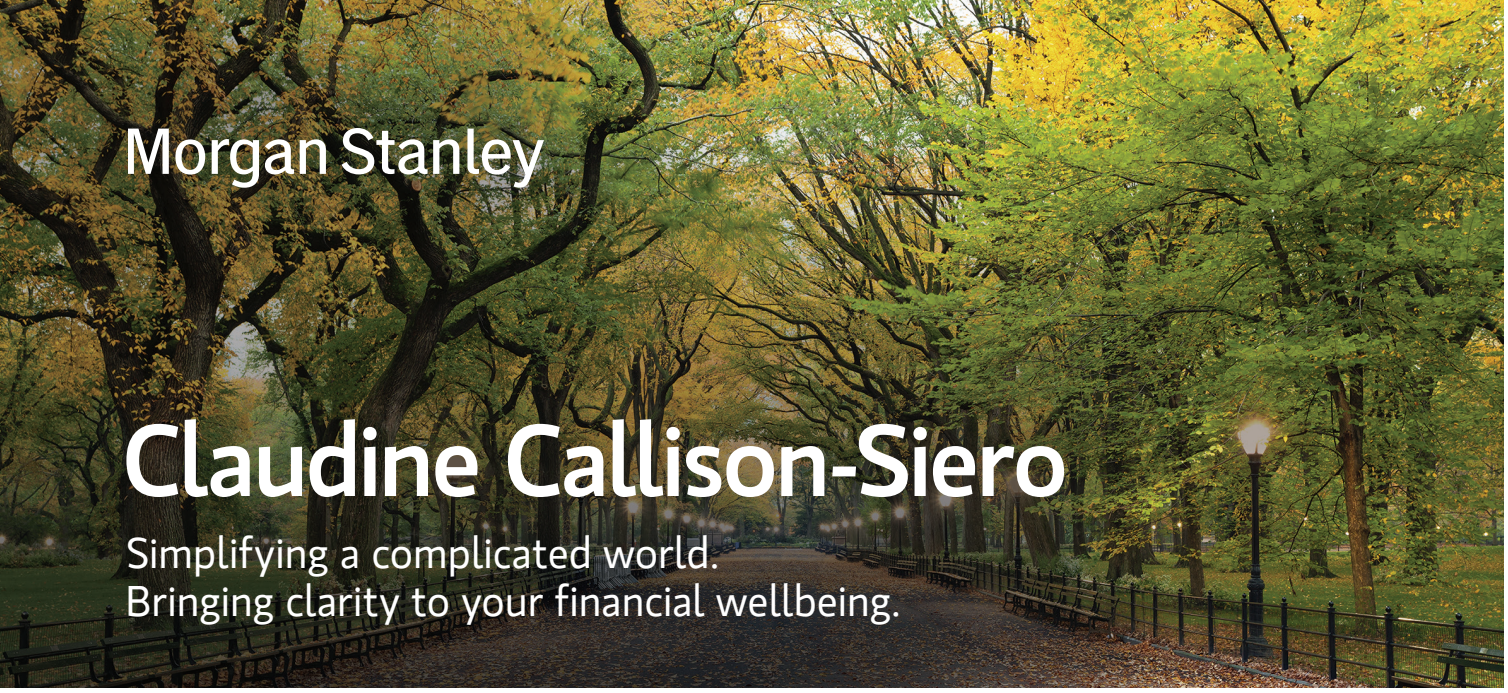

Claudine Callison-Siero

Simplifying a complicated world.
Bringing clarity to your financial wellbeing.

Life is complex. Markets are volatile. And the 24-hour news cycle makes it impossible to feel financially secure these days. That's where I come in—it's my job to simplify your financial world and help you take control of your future.

Whether it's helping you build enough wealth to retire comfortably, mitigating your tax burden or guiding you through a challenging life event, I will find the solution that helps you become financially secure.

For more than 25 years, I've been helping clients grow and preserve their wealth. My main area of focus is financial planning and comprehensive wealth management that are tailored to each client's individual needs. I build close relationships and enjoy educating clients on investments and personal finances.

As a Certified Divorce Financial Analyst, I have in-depth knowledge of tax implications and divorce-related asset distribution. During this challenging time, I'm able to work with clients and their attorneys, advise on the financial aspects of the process, and provide financial planning, budgeting, cash management services and general guidance.

I'm deeply committed to providing clients with the best advice possible. That's one reason why I earned the Family Wealth Advisor title from Morgan Stanley. I'm also part of a select group of Morgan Stanley Financial Advisors who have completed the rigorous Portfolio Management Certification Program.

I began my financial services career with Morgan Stanley and its predecessor firms in 1998. Previously, I was an Advertising Sales Executive with MTV, after receiving my bachelor of science degree from Ithaca College, studying business, communications and finance.



Claudine Callison-Siero, CDFA®
Managing Director
Financial Advisor
Portfolio Management Director
Family Wealth Advisor

NMLS # 1261933

THE PALM OAKS GROUP
AT MORGAN STANLEY

1801 N. Military Trail
Suite 300
Boca Raton, FL 33431

150 Clove Road
Little Falls, NJ 07424

973-890-3030/DIRECT
800-227-8588/TOLL-FREE
201-254-3681/FAX

claudine.callison@morganstanley.com

https://advisor.morganstanley.com/claudine.callison

"By simplifying your financial world, I'll help you feel more confident about your future."

Claudine Callison-Siero

Financial Strategies for Life

There's a reason why I only work with a select number of clients: In order to deliver comprehensive wealth management that spans a lifetime, I need to spend time with each client to help them achieve their individual goals.



Minimizing taxes through advanced asset management solutions



Maximizing executive benefits, including managing stock options and developing diversification plans



Planning for **retirement and education expenses**



Tax-efficient wealth transfer from one generation to the next



Strategic financing of major acquisitions



Achieving long-term **charitable and philanthropic goals**

For a complimentary consultation, contact me at 973-890-3884.

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