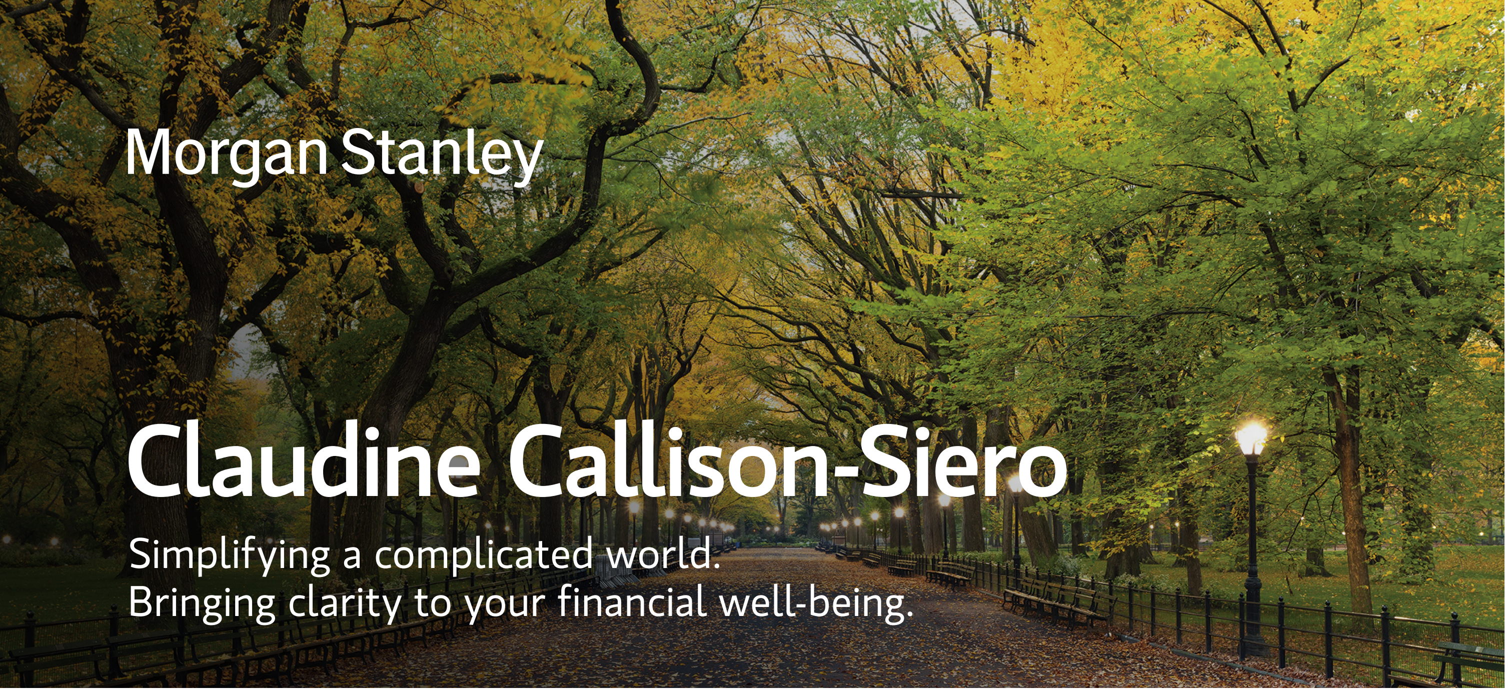

Morgan Stanley

Claudine Callison-Siero

Simplifying a complicated world.
Bringing clarity to your financial well-being.

Life is complex. Markets are volatile. And the 24-news cycle makes it sound 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 back more control of your future.

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

Claudine Callison-Siero, CDFA®

Managing Director
Financial Advisor
Portfolio Management Director Family Wealth Advisor

NMLS # 1261933

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Recognized by Forbes as one of "America's Best-in-State Wealth Advisors"

My commitment to clients has earned me a lot of industry recognition, but what really drives me is my connection with clients, like you. What I'm truly most proud of is that I've retained 98% of my clientele over the years. And in this industry, there's no better endorsement of success than that.

FORBES MAGAZINE

- "Best-in-State Wealth Advisors" (2018–2025)
- "Top Women Wealth Advisors Best – In State" (2020–2026)
- "Best-In-State Wealth Management Teams" (2023-2026)
- Read Claudine's recent interview in Forbes

> "By simplifying your financial world — I'll help you feel more confident about your future."
>
> **Claudine Callison-Siero**

2018–2025 Forbes Best-In- State Wealth Advisors
Source: Forbes.com (Awarded 2018–2025). Data compiled by SHOOK Research LLC based 12-month time period concluding in June of year prior to the issuance of the award.

2020–2026 Forbes America's Top Women Wealth Advisors

Source: Forbes.com (Awarded 2020–2026) Data compiled by SHOOK Research LLC based on 12-month time period concluding in September of year prior to the issuance of the award.

2023–2026 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Awarded 2023–2026) Data compiled by SHOOK Research LLC based on 12-month time period concluding in September of year prior to the issuance of the award.

For criteria and methodology please see the full disclosure list on last page.

MY BACKGROUND

For more than 20 years I've been helping clients to grow and preserve their wealth. My main area of focus is on financial planning and comprehensive wealth management that's tailored to each client's individual needs. I build close relationship and enjoy educating clients on wealth management 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 during divorce, advising on the financial aspects of the process and provides financial planning, budgeting, cash management services and general guidance after divorce.

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.

Financial Strategies for Life

There's a reason why I only work with a select number of clients. That's because 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

Planning for **retirement and education expenses**

Strategic Financing of a major acquisition

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

Tax-efficient wealth transfer from one generation to the next

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

For a Complimentary Consultation, contact me at: 973-890-3030

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2018-2025 Forbes Best-In- State Wealth Advisors

Source: Forbes.com (2018-2025). Forbes Best-In- State Wealth Advisors ranking awarded in 2018-2025. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in June of the previous year the award was issued having commenced in June of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2022-2026 Forbes Top Women Wealth Advisors Best-In-State

Source: Forbes.com (2020-2026). Forbes America's Top Women Wealth Advisors & Forbes Top Women Wealth Advisors Best-In- State ranking awarded in 2022-2026. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in September of the previous year the award was issued having commenced in September of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

2023–2026 Forbes Best-In-State Wealth Management Teams

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