



5 Reasons Why We're Morgan Stanley Financial Advisors (And What That Means for You)

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Finances touch every part of your life. You may be new to your career, nearing retirement or even ready to pass on your legacy — at every stage, what you do with your money matters. That's why so many families turn to a financial advisor for help.

No matter your reason for seeking counsel, picking the right advisor can be a daunting task.

You need someone you can trust with the complexities. You need someone who understands your priorities and has the resources and experience to help you achieve your financial goals. You need someone who puts your financial goals before their own.

At The Flatt / Hawk Group we want to be the best financial advisors possible. That's why we are proud to be Morgan Stanley Financial Advisors.

If you've been looking for a firm to represent your family you've likely heard of Morgan Stanley Wealth Management, but you may be wondering what being with a firm like Morgan means to you. What is the value of a Morgan Stanley Financial Advisor? What makes them different from other advisors? And what makes a Morgan Stanley Financial Advisor the right fit for your family?

In this post, we answer all those questions. We provide five reasons why we chose to be Morgan Stanley Financial Advisors and we explain the difference that makes for clients like you.

What is a Morgan Stanley Financial Advisor?

A Morgan Stanley Financial Advisor is an advisor trained by and partnered with Morgan Stanley— a multinational financial services company based out of New York. Morgan Stanley was founded in 1935 by Henry Sturgis Morgan and Harold Stanley and has since become one of the largest corporations in the United States. They now have employees and clients living and working across the globe.

As a parent firm, Morgan Stanley offers financial advisors the help they need to serve their clients well. Their resources, infrastructure and training empower teams like The Flatt / Hawk Group to do what we do best on the individual level.

If someone is a Morgan Stanley Financial Advisor, you know they have undergone rigorous training, have access to world class resources and have committed to a set of [core values](#).

5 Reasons We Are Proud to Be Morgan Stanley Financial Advisors

1. Morgan Stanley is first and foremost a wealth management firm

While widely respected, Morgan Stanley isn't the only wealth management firm on the street. We choose to partner with Morgan Stanley because it is a wealth management firm *first*. Many rival firms are banks first, wealth management second. As you can imagine that difference creates a different set of priorities.

While banking certainly has its place, our focus will always be on helping individuals reach their goals. We like that Morgan Stanley puts wealth management first, because it means we are free to put you first.

2. Morgan Stanley has world-class technology and tools

Morgan Stanley is continually investing in new ideas. They are on the cutting edge of AI and machine learning, data analytics and mobile technologies. These tools are backed by years of research and are designed to be helpful in all market conditions.

At The Flatt / Hawk Group, we want this technology because we know the difference it means for our clients. It helps us see the big picture so we can make the best decision at any given moment. That's important when you're trying to create a plan for your future and mitigate risk of the unknowns as they arise. And because so many of Morgan Stanley's innovations are devoted to the end user experience, we're able to help provide clarity and greater confidence to every client we serve.

3. Morgan Stanley is focused on client interests

When people hear about large companies they can get a little nervous. They fear their concerns would get lost in such a big corporation. While this can be the case in some industries, in our experience the opposite is true. Though they have a big platform, Morgan Stanley is focused on keeping the client's interests first. In fact, this is one of their core values. The number of advisors who choose Morgan Stanley and the numerous accolades received annually are proof that Morgan Stanley is committed to ensuring your personal goals are placed at the forefront of every decision. You are not a number; you are a priority.

The technology and structure don't get in the way of your needs. They take care of the logistics and clear obstacles so that advisors like us can sit down and listen intently to you. Morgan Stanley gives us the support we need to care for every part of your story.

4. Morgan Stanley prioritizes cyber security and protects your assets

Today most financial transactions are carried out online. And while this digital age can be convenient, many people worry their assets are vulnerable to hackers or cyber criminals. The more assets you have, the more consideration must be given to this threat.

This is an important concern for our clients, so we greatly appreciate that Morgan Stanley takes it so seriously. In fact, Morgan Stanley's Head of Wealth Management Data Security & Infrastructure Risk, [Rachel Wilson](#), formerly headed cyber exploitation missions for the NSA. This level of excellence continues from the top on down, resulting in world-class cyber security.

Individuals working with a Morgan Stanley Advisor can feel confident knowing their accounts are protected by features like multi-factor authentication, [VoiceID](#) technology and identity and fraud protection. Plus, Morgan Stanley's [Fusion Resilience Center](#) works around the clock to detect cyber threats around the globe. (The former head of this center now serves as the Director of the Department of Homeland Security's Cybersecurity and Infrastructure Security Agency.) Further information is available via our [Cybersecurity & Fraud Prevention](#) brochure, which details our policies and best practices.

5. Morgan Stanley supports multi-generational wealth

When it's managed well, wealth has the power to impact not only your life, but also improve the lives of your kids and grandkids. Though the assets may exist, the education and transfer of assets, values and knowledge to the next generation doesn't happen automatically. It requires careful planning and the right tools.

We love that Morgan Stanley provides this for you. We offer [financial literacy](#) tools for parents and kids and have resources dedicated to supporting children as they move into adulthood.

These options help Morgan Stanley Advisors like us not only care for your assets, but to serve your families overall financial wellbeing. You won't wonder whether your kids are ready to receive their inheritance or worry about your hard earned wealth becoming a curse instead of a blessing.

What Sets The Flatt / Hawk Group Apart from Other Morgan Stanley Financial Advisors?

As you can see, we choose to work with Morgan Stanley because of their focus on people, their commitment to service and their access to resources. It's rare to see such a client-first attitude from such a big company. We believe the real magic happens when you sit down to work with us — a firm backed by the power of Morgan Stanley, but free to cater to your needs in a more personal setting. That's when all the resources, tools and values begin to make a difference in your life.

At The Flatt / Hawk Group we create a legacy of lasting relationships. We want you to feel seen and know that you are heard. We believe the best way to be there for you is to truly understand you and your family. From there, we help you meet your financial goals.

Some advisors are reactive; they wait for you to come to them. This is not the case at The Flatt / Hawk Group. We have processes built into our practice to ensure we're proactive in helping our clients navigate each life stage. We know your world is always changing, so we help you stay ahead of the change — that way you're ready no matter what comes next.

This approach gives our clients freedom to relax and to dream. It provides you with the *financial clarity you deserve*.

If that's something you're interested in, we'd love to talk about how we can serve you. Just [schedule a meeting](#) to get started!

Disclosures:

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