

Core Purpose Wealth Management

Morgan Stanley



2025 Edition One

Team Insights

[Client Preferred Name]

This year has brought lots of exciting changes! In January, we announced our new name, Core Purpose Wealth Management at Morgan Stanley! We enjoyed welcoming new team members, and said goodbye to our long-tenured teammate, Peggy Jandris, who is enjoying retirement after a successful career at Morgan Stanley.

We are working hard, and still taking time to enjoy and be grateful for our friends and families, understanding that life is so much richer with them by our sides. Please take a few minutes to read our Team Tidbits and see what is new in our lives – and reach out to us if there is news you would like to share!

Also included in this issue are the New Rules for Withdrawing from IRAs and valuable information on Gifting. Please take a read and let us know if you have questions.

We want to express our sincere gratitude for the trust and confidence you place in us and look forward to hearing from you soon!

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