Morgan Stanley

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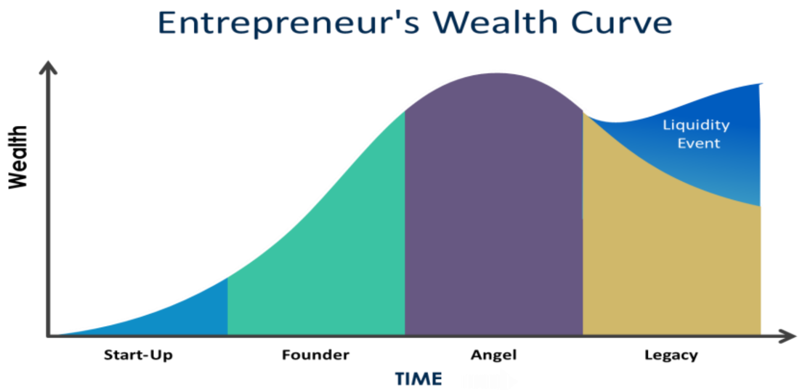
Venture Solutions

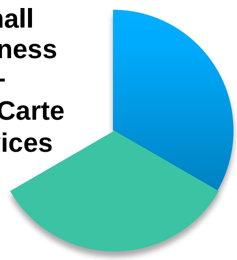
Tailored Solutions for the Entrepreneurial Community



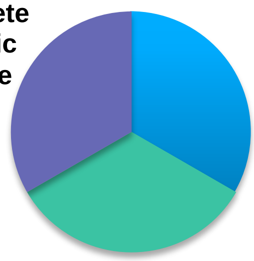
Service Models

Personal Asset Allocation & Portfolio Construction

Small Business + A La Carte Services



Complete Holistic Advice



START-UP

- Access to Morgan Stanley Products and Services
- Low Cost
- Face to Face
- Insurance
- Starter Financial Plan

FOUNDER

- Employer/Employee Benefit Plans
- Competitive Pricing
- Insurance Solutions
- Comprehensive Financial Planning
- Access to Lending and Cash Management

ANGEL

- Family Wealth Manager
- Full Concierge Services
- Lifestyle Advisory
- Estate & Legacy Planning Strategies
- Impact Investing
- Wealth Education

Why Our Clients Choose Us

Our mission is to help secure and preserve our client’s financial goals by enabling the next generation of Entrepreneurs with access to highly competitive and relevant solutions.

ACCESS

Global Leader in Wealth Management

Research

Comprehensive Manager Analysis

Due Diligence

Alternatives Investments

Leading Edge Technology

CLIENT EXPERIENCE

Bespoke Solutions

Tailored Portfolios

1:1 Personal Relationships

Dedicated Team Support

Continuous Monitoring

Full Digital Offerings: MSOnline + Mobile

National coverage

BONA FIDES

24+ years Combined Experience in Financial Services*

CFA, CFP® *

Masters of Science Tech Commercialization*

Two MBAs*

Local Knowledge

Disclosures
*Daniel Crites - CFP®, MBA, MSTC, 7+ years of experience
*Hunter Stanco - CFA, MBA, 17+ years of experience

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Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

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