Morgan Stanley Tax Planning Referral Network: PwC

Activating your tax strategy requires experience and foresight. PwC can help you make the best decisions for you to strategically move your business forward with confidence.

In today's complex world marked by interdependent markets, global interests, and changing tax requirements, it can be difficult to have confidence when it comes to your financial life. PwC understands this and the unique challenges you face in managing your wealth and planning for the future. We have a dedicated and experienced group of professionals who provide tax and wealth planning to high net worth individuals and their families. Our practice offers the judgement, experience, and capability required to help you achieve your goals now and for future generations.

NOTED RECOGNITION

- PwC advises 100,000 of the world's entrepreneurial and private businesses
- PwC serves 29% of the family businesses listed on Forbes Largest Private Company List (2019)
- PwC has been helping clients for over 170 years

Source: PwC; As of July 2020

SPECIALTY SERVICES

- Estate, Trusts & Gifts Tax Planning
- State & Local Tax Planning
- Tax Planning & Compliance
- Tax-efficient Philanthropic Planning
- Mergers & Acquisitions Tax
- Cross-border Tax Planning for Multi-generational Families
- Tax Accounting
- Tax Depreciation Services
- Tax-efficient Transfer Pricing
- Tax Controversy & Regulatory Processes
- Family Office Tax Planning
- Lifestyle (unique) Investments
- Tax-aware Continuity & Succession Planning

PwC's TAX SERVICES

1. **Tax Readiness:** Helping clients stay ahead of technical changes impacting their tax strategy
2. **Tax Function of the Future:** A look forward at tax strategy and transformation
3. **Policy on Demand:** An inside glimpse into policy developments through access - whenever clients want it -- to briefings and conversations on key legislative, regulatory, and trade developments for everyone
4. **Intelligent Tax Filing Solutions:** Delivering scalable, in-house, tax preparation and planning services across the globe

A NETWORK OF EXPERIENCED TAX SERVICE PROVIDERS

You can now access an open architecture tax planning and preparation network offering services delivered by experienced tax professionals at leading U.S.-based providers.

	Year Founded	Headquarters	Number of Professionals	Number of US Offices
Andersen	2002	San Francisco, CA	1,000	19
EisnerAmper LLP[1]	1963	New York, NY	1,900	12
EY	1989	New York, NY	9,000	101
Grant Thornton LLP[1]	1924	Chicago, IL	8,730	56
KPMG LLP[2]	1987	New York, NY	38,000	100
PwC US[3]	1998	New York, NY	17,000	86

[1]As of September 2020 ; [2]As of January 2020; [3]As of July 2020

HOW IT WORKS

1. Working with your Morgan Stanley Financial Advisor, reach out to the firm(s) whose service(s) you'd like to learn more about (see contact information on the next page).

2. The tax professional will craft a custom solution for you based on your unique tax needs and provide you with an individualized quote for services.*

3. You may sign an engagement letter with the tax firm for the provision of the customized tax services you will receive.

Interested in a price comparison?

Ask your Financial Advisor about the Quote Request Form, which you can submit to multiple firms from whom you would like to receive a quote for services.

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TAX SERVICE PROVIDERS: CONTACT INFORMATION

Please note that Network firms are not required to enter into an engagement with a referred Morgan Stanley client and make their own determination as to client suitability. While their decision to work with a new client is based upon a number of factors, **be aware that the Network may not be appropriate for clients with simple tax situations and needs. If you have questions, you are encouraged to reach out to the Network firms to understand their pricing and suitability parameters.**

TAX FIRM	RELATIONSHIP LEAD	EMAIL	PHONE
ANDERSEN	Nicholas Lagoni – *Director*	nicholas.lagoni@andersen.com ***For general inquiries:*** mstaxinquiry@andersen.com	312-239-6144
EISNERAMPER	Jim Jacaruso – *Director*	james.jacaruso@eisneramper.com	347-735-4655
	Stephanie Hines – *Partner*	stephanie.hines@eisneramper.com	212-891-6046
EY Building a better working world	Joel Friedlander – *Principal*	joel.friedlander@ey.com	516-982-2004
	Anthony A. Williams – *Senior Manager*	anthony.williams@ey.com	808-728-9568

EY TaxChat

EY TaxChat: Tax Preparation Services Only

Some taxpayers may not require complex tax planning work. For clients who may simply need tax returns to be prepared and filed, consider [EY TaxChat](), an on-demand mobile service that connects users with knowledgeable tax professionals who can prepare and file returns in a secure, online environment.

Questions*? Visit the EY TaxChat website, or call/email:

Brigitte Chip – Managing Director
brigitte.chip@ey.com | 212-744-8364

*Ask about a preregistration discount code which may be available for TaxChat services**

TAX FIRM	RELATIONSHIP LEAD	REGION	EMAIL	PHONE
KPMG	Stephen D. Smith – *Senior Director*	*Eastern Region*	stephendsmith@kpmg.com	212-954-8133
	Brad Sprong – *Tax Partner*	*Midwest Region*	bsprong@kpmg.com	816-802-5270
	Taylor Mallard – *Managing Director*	*Western Region*	tmallard@kpmg.com	206-913-5042

Note: *KPMG will only perform individual tax work when also engaged to perform tax work for a client's private business or family office.*

TAX FIRM	RELATIONSHIP LEAD	REGION	EMAIL	PHONE
Grant Thornton	Curtis Young – *Tax Managing Director*	*Northeast Region*	curtis.young@us.gt.com	631-577-1855
	Michele Melchior – *Tax Managing Director*	*Southeast Region*	michele.melchior@us.gt.com	704-926-0377
	Dan Potter – *Tax Managing Director*	*Central Region*	dan.potter@us.gt.com	414-277-6411
	Angie Sosa – *Tax Partner*	*West Region*	angie.sosa@us.gt.com	775-332-1791

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TAX FIRM	RELATIONSHIP LEAD		EMAIL	PHONE
pwc	**Amy Tsang –** *Partner* ***Primary Contact***	*Western Region*	amy.tsang@pwc.com	415-470-4102
	Sharon De Greiff - *Partner* ***Primary Contact***	*Western Region*	sharon.degreiff@pwc.com	310-400-2788
	Jeffrey Barringer	*Northern Region*	jeffrey.barringer@pwc.com	248-219-7173
	Richard Barjon	*Northern Region*	richard.barjon@pwc.com	917-531-8172
	Steve Diaz	*Southern Region*	steven.m.diaz@pwc.com	305-807-2941
	Rob Popovitch	*Southern Region*	rob.popovitch@pwc.com	469-594-1573
	Matt Ostrelich	*Eastern Region*	matthew.ostrelich@pwc.com	781-801-3506
	Dave Cherill	*Eastern Region*	david.m.cherill@pwc.com	215-266-8039
	Dave Pouso	*Corporate Programs*	david.m.pouso@pwc.com	*646-734-9612*

Disclosures

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