Morgan Stanley

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My Commitment to You

I strive to distinguish myself by the questions I ask and the relationships I nurture rather than by the products I recommend. As your experienced Financial Advisor, I help you build financial security, maintain that wealth, and, depending on your wishes, pass it on to your heirs or philanthropic endeavors. To enhance your experience, I draw upon Morgan Stanley's resources.

My practice is founded on trust and integrity, and focused on helping you achieve your long-term financial goals.

My Philosophy

The first guideline of financial advice is not about stocks, bonds, mutual funds, insurance products or markets.

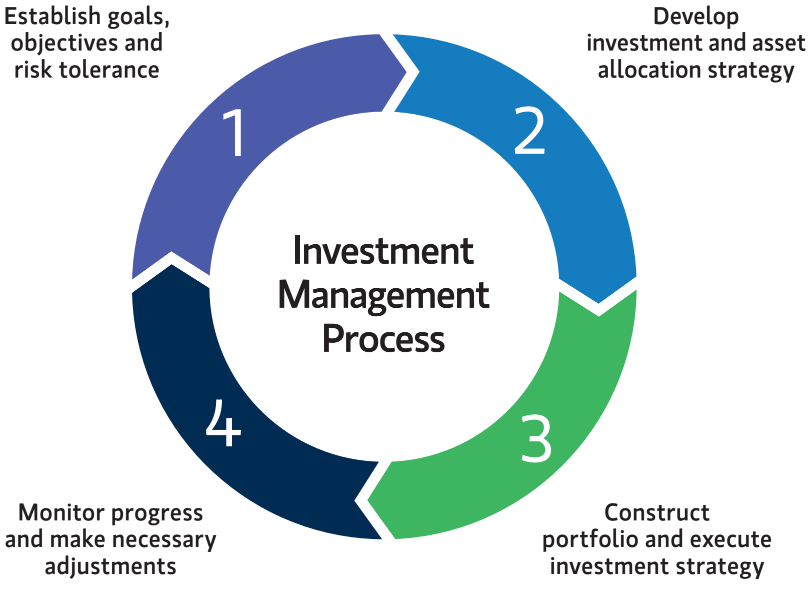
Such knowledge is essential, but it's secondary to knowing my client. My role as your advisor is to ensure all areas of your financial goals and objectives are addressed and continually reviewed. Further, I will help you navigate through all the financial information that you may be bombarded with to determine what is valuable and what is not. I seek to provide proper asset allocation with quality strategic moves to potentially take advantage of current market conditions.


Financial Independence
Asset Management
Risk Management; Asset Protection
Liability Management
Building Your Financial House
Estate Planning; Strategies; Will/Trust
Debt Management; Debt Leveraging
Goals and Financial Planning
Emergency Funds

Wealth Management Process

The financial markets are dynamic and unpredictable.

I work to counter that inherent uncertainty by taking a proactive, consultative approach rooted in a deep knowledge of your needs and dreams, your risk tolerance and your time horizon. Drawing on my own insights, as well as Morgan Stanley's global research, I am able to make informed recommendations and design a flexible investment management plan that is uniquely yours.



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