

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.

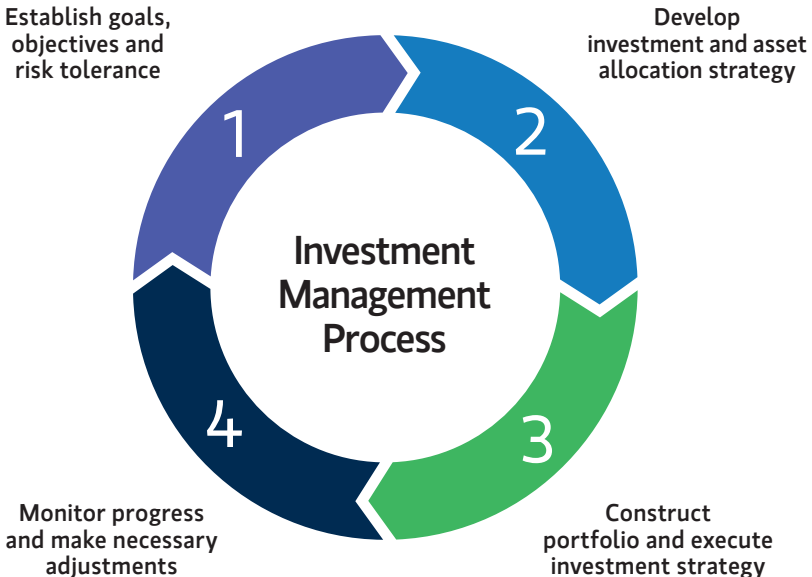
Such knowledge is essential, but it's secondary to knowing my client. My role as your advisor is to ensure all areas of your financial goals and objectives are addressed and continually reviewed. Further, I will help you navigate through all the financial information that you may be bombarded with to 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.



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.





Morgan Stanley Smith Barney LLC (“Morgan Stanley”), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. 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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