Morgan Stanley

Elizabeth Peterson

CFP®, CRPS®

Primary Services

DISCUSS AND IDENTIFY WHAT YOU WANT TO ACCOMPLISH WITH YOUR MONEY

- Create plan to help meet goals.
- Analyze current and future cash flow; coordinate all income sources.
- Act as personal assistant; maintain financial notes; notify you of action to be taken on time-sensitive matters.
- Keep you organized and help simplify your financial life.

RISK MANAGEMENT

- Identify your risk tolerance.
- Analyze current and future investment risks; modify as appropriate.
- Provide insurance and long-term care insurance; protect against rising health care costs.

INVESTMENT MANAGEMENT

- Identify and analyze investment opportunities; monitor daily.
- Track your progress with you in regular performance reviews.
- Keep you updated on market perspectives.
- Spend time helping you understand the "hows" and "whys" of recommendations.

Elizabeth Peterson

Financial Advisor

1301 A Street
Suite 300
Tacoma, WA 98402

253-597-7583 / DIRECT

elizabeth.peterson@morganstanley.com
advisor.morganstanley.com/elizabeth.peterson

The Extra Mile

- Facilitate intergenerational communications; mediate family planning meetings.
- Help instill your vision and philosophy in your children.
- Offer financial guidance to your children, parents and others close to you.
- Provide guidance on external financial assets, e.g., 401(k)s, deferred compensation and employee stock ownership plans, assets and liabilities, etc.
- Evaluate financial aspects of job offers.
- Act as sounding board for any issue or concern.

Deeper Dive

- Deliver one-stop shopping; coordinate and collaborate with other professionals, e.g., your attorney or accountant.
- Provide general guidance on tax, charitable and legacy planning; discuss estate-planning strategies.
- Offer invitations to special educational seminars and events to deepen knowledge on topics such as Medicare, Social Security and taxation, among others.

CRC 6105319 01/24 CS 974312-4054905 01/24