Wealth Management Consultative Process **Greg LeClair – Morgan Stanley** Managing Director - Wealth Management Portfolio Management Director, CIMA® Financial Advisor **Mutual Commitment Regular Process Meetings Discovery Meeting Investment Plan Meeting** 45-Day Follow-Up Meeting Meeting Review of progress and Presentation of investment Organization of account Complete discovery Confirmation of implementation of wealth process plan paperwork commitment management plan Duration: 1-1.5 hours Duration: 1-1.5 hours Duration: 1 hour Duration: 1 hour Duration: 1 hour Interval to next meeting: Two Weeks One Week 90+ Days Regular / Periodic 45 Days

Due to the high level of attention we help provide our clients, we limit our services to those with a minimum of \$2MM of investable assets.

Morgan Stanley Smith Barney LLC. Member SIPC CRC 5452563 08/2023

Morgan Stanley

Two Union Square 601 Union Street, Suite 5200 Seattle, WA 98101 (206) 344-2474