

New opportunities. Expanded resources.



[Client Preferred Name]

I want to share some exciting news with you about my practice. My goal has always been to make more of Morgan Stanley’s resources available to you and your family. That’s why I’m happy to announce my services now include a broader network of trained professionals in the areas of financial planning, portfolio risk, and cash management.

Along with the firm’s resources, I am committed to providing you with new opportunities to grow and manage your wealth. We’ll be in touch soon to make sure that you’re up to date on all the new offerings available to you, including Morgan Stanley’s LifeView® Financial Plan, Portfolio Risk Tool, and Cash Management & Lending Review.

Thank you,
Jason

Check Out My New Website!

Lifeview Financial Plan



Now it’s easier to plan your goal and manage your risk tolerance.

Learn More

Portfolio Risk Tool

The Portfolio Risk Tool helps you quantify risk, stress test your portfolio, and evaluate potential portfolio changes.

Learn More



Cash Management & Lending Review

Learn about a modern alternative to banking.



Learn More

Meet My Team:

Jason Sanders

Senior Vice President,
Wealth Management,
Financial Advisor,
Senior Portfolio Management Director,
Workplace Advisor – Equity Compensation

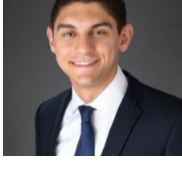


Direct: (516) 683-3173
Toll-Free: (800) 488-4083
Email: jason.sanders@morganstanley.com

Jason has been a financial advisor for over 30 years, and with Morgan Stanley since 2012. He is a Certified Portfolio Manager and Corporate Retirement Director. Jason is married with 4 daughters and live in Port Washington NY. His passions are skiing and music.

Christopher Driscoll

Client Service Associate



Phone : (516) 227-6138
Email: Christopher.driscoll@morganstanley.com

Christopher received a Bachelor of Science in Business Administration at Farmingdale State College. He currently resides in Seaford, NY. Christopher Driscoll is a registered client services associate serving Morgan Stanley’s Wealth Management offices. Outside of the office, Christopher enjoys traveling, working out, and attending sporting events.

Additional Firm Resources

Charlie Simon

Planning Virtual Engagement Associate



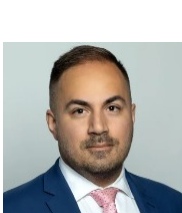
Phone : (212) 276-5334
Email: charlie.simon@morganstanley.com

Charlie is a Planning Associate at Morgan Stanley providing dedicated financial planning support to Financial Advisors and their teams. He earned his undergraduate degree from Gettysburg College and received the Financial Planning Specialist* designation from the College for Financial Planning. Charlie is originally from Fairfield, Connecticut and currently resides in New York City.

This role cannot solicit or provide investment advice

Breno Vilete

Associate Private Banker

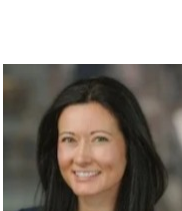


Work: (516) 227-2812
Mobile: (516) 913-0504
Email: Breno.Vilete@morganstanley.com

Breno is an Associate Private Banker serving Morgan Stanley Wealth Management offices in New York. Breno began his career in financial services in 2011, and joined Morgan Stanley in 2022 as an Associate Private Banker. Breno is a graduate of the Kean University, where he received a Bachelor of Science in Finance. He lives in Wantagh, New York. Outside of the office, Breno enjoys riding his peloton, working out, and watching movies.

Dana Jordan

Private Banker



Work: (516) 227-2860
Mobile: (929) 946-9553
Email: Dana.Jordan@morganstanley.com

Dana began her career in financial services in 2017 when she joined Morgan Stanley as a Lending Analyst in Private Banking Operations. She most recently returned to the firm in 2022. Prior to joining the firm, she was a Mortgage Professional at JP Morgan Private Bank. Dana is a graduate of Loyola University Maryland, where she received a Bachelor of Business Administration in Finance. Outside of the office, Dana donates her time to the American Legion Auxiliary Unit 1006. She is a Senior Gold Medalist and USFSA (U.S. Figure Skating Association) member, and enjoys partaking in CrossFit.

Andrew Bertalli

Financial Planning Director, Vice President



Work: (631) 755-8916
Mobile: (929) 288-0447
Email: Andrew.Bertalli@morganstanley.com

Andrew began his career in financial services in 2000 and joined Morgan Stanley in 2022. Prior to his current position, Andrew served high-net-worth clients for over 17 years. Andrew also has worked at Charles Schwab, USAA, and TIAA. Andrew graduated from Saint Francis College and has a Bachelor of Science in Business. Andrew holds his Certified Financial Planner® designation. Outside of work, Andrew likes to keep fit and spend time with his family. Andrew holds a private pilot license and served in the US Navy.

If you have any questions or would like additional information, please don't hesitate to reach out!

[Signature of Primary Contact]

[System will insert CRC number here]

NOTICE: Morgan Stanley is not acting as a municipal advisor and the opinions or views contained herein are not intended to be, and do not constitute, advice within the meaning of Section 975 of the Dodd-Frank Wall Street Reform and Consumer Protection Act. If you have received this communication in error, please destroy all electronic and paper copies and notify the sender immediately. Mistransmission is not intended to waive confidentiality or privilege. Morgan Stanley reserves the right, to the extent permitted under applicable law, to monitor electronic communications. This message is subject to terms available at the following <https://www.morganstanley.com/disclaimers>. If you cannot access these links, please notify us by reply message and we will send the contents to you. By communicating with Morgan Stanley you acknowledge that you have read, understand and consent, (where applicable), to the foregoing and the Morgan Stanley General Disclaimers.

This material has been prepared for informational purposes only. It does not provide individually tailored investment advice. It has been prepared without regard to the individual financial circumstances and objectives of persons who receive it. Morgan Stanley Smith Barney LLC ("Morgan Stanley") recommends that investors independently evaluate particular investments and strategies and encourages investors to seek the advice of a Morgan Stanley Financial Advisor. The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Past performance is no guarantee of future results. The Portfolio Analysis report ("Report") is generated by Morgan Stanley Smith Barney LLC's ("Morgan Stanley") Portfolio Risk Platform. The assumptions used in a Report incorporate portfolio risk and scenario analysis employed by BlackRock Solutions ("BRS"), a financial technology and risk analytics provider that is independent of Morgan Stanley. BRS' role is limited to providing risk analytics to Morgan Stanley, and BRS is not acting as a broker-dealer or investment adviser nor does it provide investment advice with respect to the Report. Morgan Stanley has validated and adopted the analytical conclusions of these risk models.

Any recommendations regarding external accounts/holdings are asset allocation only and do not include security recommendations. IMPORTANT: The projections or other information provided in a Report regarding the likelihood of various investment outcomes (including any assumed rates of return and income) are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Hypothetical investment results have inherent limitations.

- There are frequently large differences between hypothetical and actual results.
- Hypothetical results do not represent actual results and are generally designed with the benefit of hindsight.
- They cannot account for all factors associated with risk, including the impact of financial risk in actual trading or the ability to withstand losses or to adhere to a particular trading strategy in the face of trading losses.
- There are numerous other factors related to the markets in general or to the implementation of any specific strategy that cannot be fully accounted for in the preparation of hypothetical risk results and all of which can adversely affect actual performance.

Morgan Stanley cannot give any assurances that any estimates, assumptions or other aspects of the risk analyses will prove correct. They are subject to actual known and unknown risks, uncertainties and other factors that could cause actual results to differ materially from those shown in a Report.

A LifeView Financial Plan ("Financial Plan") is based on the methodology, estimates, and assumptions, as described in the report, as well as personal data provided by the client. It should be considered as a working document that can assist a client with their objectives. Morgan Stanley makes no guarantees as to future results or that an individual's investment objectives will be achieved. The responsibility for implementing, monitoring and adjusting the financial plan rests with the client. After the Financial Advisor delivers the report to the client, if desired, the Financial Advisor can help the client implement any part that they choose; however, the client is not obligated to work with the Financial Advisor or Morgan Stanley. Please see our [Privacy Pledge](#) for details about how Morgan Stanley handles personal information.

Important information about a relationship with the Financial Advisor and Morgan Stanley Smith Barney LLC when using LifeView Advisor or LifeView Personal Wealth Advisor. When a Financial Advisor prepares a Financial Plan, they will be acting in an investment advisory capacity with respect to the delivery of the Financial Plan. This Investment Advisory relationship will begin with the delivery of the Financial Plan and ends thirty days later, during which time the Financial Advisor can review the Financial Plan with the client. To understand the differences between brokerage and advisory relationships, a client should consult their Financial Advisor, or review our "Understanding Your Brokerage and Investment Advisory Relationships," brochure available at <https://www.morganstanley.com/wealth-relationshipwithms/pdfs/understandingyourrelationship.pdf>

Private Bankers are employees of Morgan Stanley Private Bank, National Association, Member FDIC.

Morgan Stanley Smith Barney LLC is a registered Broker/Dealer, Member SIPC, and not a bank. Where appropriate, Morgan Stanley Smith Barney LLC has entered into arrangements with banks and other third parties to assist in offering certain banking related products and services.

Investment, insurance and annuity products offered through Morgan Stanley Smith Barney LLC are: NOT FDIC INSURED | MAY LOSE VALUE | NOT BANK GUARANTEED | NOT A BANK DEPOSIT | NOT INSURED BY ANY FEDERAL GOVERNMENT

If you would like to update your email preferences or unsubscribe from marketing emails from Morgan Stanley Wealth Management, you may do so [here](#). Please note, you will still receive service emails from Morgan Stanley Wealth Management.

Not all products and services may be available to persons living outside of the United States.

Morgan Stanley Wealth Management
2000 Westchester Avenue, Purchase, NY 10577-2530 USA

©2024 Morgan Stanley Smith Barney LLC. Member SIPC.