Morgan Stanley

Jay Dewan

Furthering Your Family's Financial Progress

Many of my clients have been with me for as long as I've been in the financial services industry — that's more than 25 years.

I find it especially gratifying when clients introduce me to their children confident that I will continue to provide their family with sound financial advice. That advice includes your investments and goes far beyond your portfolio to encompass lending, insurance and philanthropy — virtually every aspect of your financial life.

Working With You

INITIAL DISCUSSIONS

- Who are you as a person, as well as an investor
- What do you hope to achieve for yourself and your family?
- What do you fear might be standing in your way?

FORMULATING YOUR PLAN

- Allocating your assets to help meet your risk tolerance, timeframe and objectives
- Creating a customized plan to help meet goals such as leaving a legacy, purchasing real estate, generating retirement income and providing for an aging parent

IMPLEMENTING YOUR PLAN

- Collaborating with your attorney and accountant to help ensure a 360-degree view of your overall finances
- Identifying third party investment management organizations with histories of generating consistent returns
- Assessing your portfolio to determine where it might be vulnerable
- Stress testing your portfolio to determine how it might react to different market and economic conditions

Jay Dewan

Executive Director

Family Wealth Director

Portfolio Management Director

Financial Advisor

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"My clients may not be family, but they are to me."

Jay Dewan

MY BACKGROUND

From the time I was growing up in Clifton, finance fascinated me. I've spent my entire career with the same firm where I've been a Financial Advisor since 2005. The Palm Oaks Group at Morgan Stanley is a team of seasoned financial professionals who advise clients on every aspect of their financial lives.

I offer discretionary management for clients who would prefer not to make day-to-day investment decisions on their own. My area of expertise is creating customized asset allocations that I generally implement with professionally managed investments.

And as a Morgan Stanley Family Wealth Advisor, I go far beyond investments to provide guidance on leaving a meaningful legacy, using debt to their advantage, managing risk and maximizing their philanthropic activities.

I'm a graduate of Montclair State University with a degree in finance. Most of my free time is spent volunteering at the Clifton Animal Shelter, where I help stray, surrendered, or neglected animals find their forever homes. I believe my commitment to the Shelter stems from the same instincts that led me to become a Financial Advisor. It's all about my desire to put others first and go above and beyond expectations to make a difference.

Managing Your Assets

Before I became a Financial Advisor, I served as a mutual fund specialist with a Morgan Stanley predecessor firm. The skills I learned still serve my clients and me in good stead. As a Morgan Stanley credentialed Portfolio Management Director, I typically implement your investment strategy with mutual funds, exchange-traded funds and separately managed accounts managed by carefully researched third party management organizations who have demonstrated the ability to provide investors with consistent returns over time.

A Commitment to Service

I care about each and every client and strive to go the extra mile to make certain they understand that I'm there to help them achieve the goals most important to them. I like to meet with my clients regularly and stay in close touch via phone, email and social media. They know they can always reach me whenever they have a question, concern or simply want to talk about current markets and how their investments are performing. I consider responsiveness to be a top priority, and I can confidently state that none of my clients ever have to call me twice.

For a Complimentary Consultation, contact me at: 973-890-3030

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