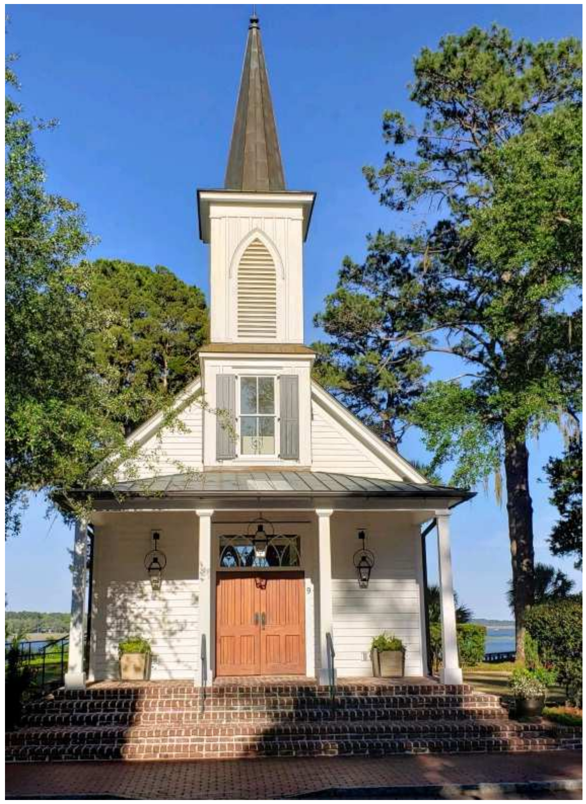
Morgan Stanley

Aligning Your Values with Your Finances



My faith teaches that each of us are called to be stewards of the blessings we have been provided. But for many of us, the intersection of faith and our financial resources may be easily overlooked. For interested clients, I am available to assist in exploring the principles of their faith in relationship to their portfolio, stewardship of assets, and how lifetime financial and legacy estate plans can reflect those values.

Ask me about Morgan Stanley's Impact Quotient (MSIQ), an innovative resource that can assist in evaluating your portfolio to determine if it aligns with your values and goals.

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"Guiding Investors on the Journey of Life"

Analysis of targeted populations for impact, faith-based approach and private alternative investments are currently not available in Morgan Stanley Impact Quotient reports, but is intended to become available as data becomes available. These objectives may still be reported as an intentional area of focus by some third-party investment managers.

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CRC 6455915 3/24