

# The Conscious Wealth Management Group at Morgan Stanley

## Laura Russell-Jones

Senior Vice President, Financial Advisor, Investing with Impact Director,  
Certified Exit Planning Advisor (CEPA), Qualified Plan Financial Consultant (QPFC)

### The More You Know, The Smarter Your Investments.

As a Financial Advisor, I have a unique approach to investing designed to empower my clients with the knowledge they need to make the right financial choices and set them on the path to achieving their life goals. Crafting a customized investment portfolio means taking the time to understand your aspirations and working alongside you to develop a robust, personalized plan that's flexible enough to adapt when life changes happen. I believe smart investments come from a combination of market knowledge, deep personal insights, and delivering my clients exceptional investment advice.

#### A Trusted Advisor for the Road Ahead

Clients work with me because they want a trusted, professional advisor who helps them organize their finances, provides sound professional advice, navigates through their financial transitions, and develops a long-term financial roadmap to accomplish their goals. Clients can spend less time worrying about their finances and more time enjoying life.

#### Tailored Solutions and Personalized Service

Each of my clients have unique financial needs and concerns, especially during times of life transition, which need to be handled with compassion and dedication. My consultative, holistic approach means I take the time to listen and understand my clients' needs to develop a highly customized investment portfolio and investment strategy.

#### Professional Investment Advice

With experience and thoughtful insight, I focus on maintaining your long-term investment objectives and strategy.

#### A Commitment to Excellence

Everyone deserves a genuine, thoughtful financial plan and disciplined investment strategy that preserves and grows their wealth. I am committed to delivering you the level of service that I would wish for my family.

#### Your Extended Team of Firm Resources

Morgan Stanley is a top-tier wealth management firm that offers best-in-class research, strategy, tools, portfolios, and technology. Access to these resources and highly skilled professionals allows me to focus on providing my clients with sophisticated strategic solutions.

#### Education & Workshops

Financial literacy is key to making clients feel confident in their financial decisions. I host a several Educational Seminars each year as well as regular "Women in Wealth" Series.



**Laura Russell-Jones**

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#### My Mission is Simple:

To deliver tailored investment solutions that strengthen your financial future, allowing you to focus on what brings true meaning into your life.

## Clients Served

- Women Investors
- Business Owners – Start-up to Exit Planning
- Senior Executives and Professionals
- Divorcees and Widows/Widowers
- Retirees
- Affluent Individuals and Multi-Generational Families
- Foundations and Non-Profits

## Comprehensive & Holistic Suite of Services

I help my clients stay on track to achieve their goals throughout every stage of life, especially during personal adversity, market volatility, and geopolitical turmoil when professional guidance is most needed. I am committed to helping clients stay focused on their financial plan so that they can best preserve and grow their wealth and spend more time on their friends, family, career, and community.

### Investment Planning & Wealth Management

- Portfolio Review
- Risk Management
- Dynamic Rebalancing
- Tax Efficient Portfolio Management
- Sustainable/Socially Responsible Investing
- Alternative Investments

### Retirement & Financial Planning Strategies

- 401K/IRA Rollovers
- Life Transition Planning
- 529 College Planning
- Social Security & Pension Analysis
- Budget & Cash Flow Analysis
- Estate Planning

### Business Solutions

- Cash Management & Lending Solutions
- Defined Benefit/401K Plans
- Stock Option Plans
- Strategies for Concentrated Positions
- Buy Sell Agreements
- Succession & Exit Planning

### Wealth Protection & Philanthropy

- Insurance Review – Life, Disability & Long Term Care
- Charitable Planning & Donor Advised Funds
- Private Foundations
- Trust Strategies

Planning your financial future is no easy task. That's why you need guidance and personal attention along the way. If you're looking for investment decisions and a caring financial advocate, contact me today for a personal consultation: **415-984-6060**.

### About Me

As a woman, mother, and former business owner, I'm a strong advocate for women in leadership, investing with impact, and women-owned businesses. I'm committed to helping women grow their businesses, be successful leaders, and become financially independent and confident in their financial future. I grew up in San Francisco, attended UC Berkeley and now live in Oakland. I've been married for 25 years and have a daughter attending college.

### Designations

As an "Investing with Impact Director," I focus on integrating a socially responsible portfolio that aligns with your personal values.

As a Certified Exit Planning Advisor (CEPA), previous business owner and Merger & Acquisition's advisor, I work with business owners contemplating the sale of the business. This means guiding them through a succession or exit plan or planning for their future.

As a Qualified Plan Financial Consultant (QPFC), I assist business owners in evaluating, designing, implementing and managing employer-sponsored retirement plans.

### Leadership & the Community

I actively volunteer and sponsor community organizations, such as Impact 100 of the East Bay. I am a board member of National Association of Women Business Owners (NAWBO-CA) and a former President of the San Francisco Bay Area Chapter. I am a member of Women Presidents Organization (WPO). Formerly a member of National Charity League (NCL) and on the leadership committee for How Women Lead and 50/50 Women on Boards.

The returns on a portfolio consisting primarily of Environmental, Social and Governance (“ESG”) aware investments may be lower or higher than a portfolio that is more diversified or where decisions are based solely on investment considerations. Because ESG criteria exclude some investments, investors may not be able to take advantage of the same opportunities or market trends as investors that do not use such criteria.

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Morgan Stanley Smith Barney LLC does not accept appointments nor will it act as a trustee but it will provide access to trust services through an appropriate third-party corporate trustee.

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