The Conscious Wealth Management Group at Morgan Stanley

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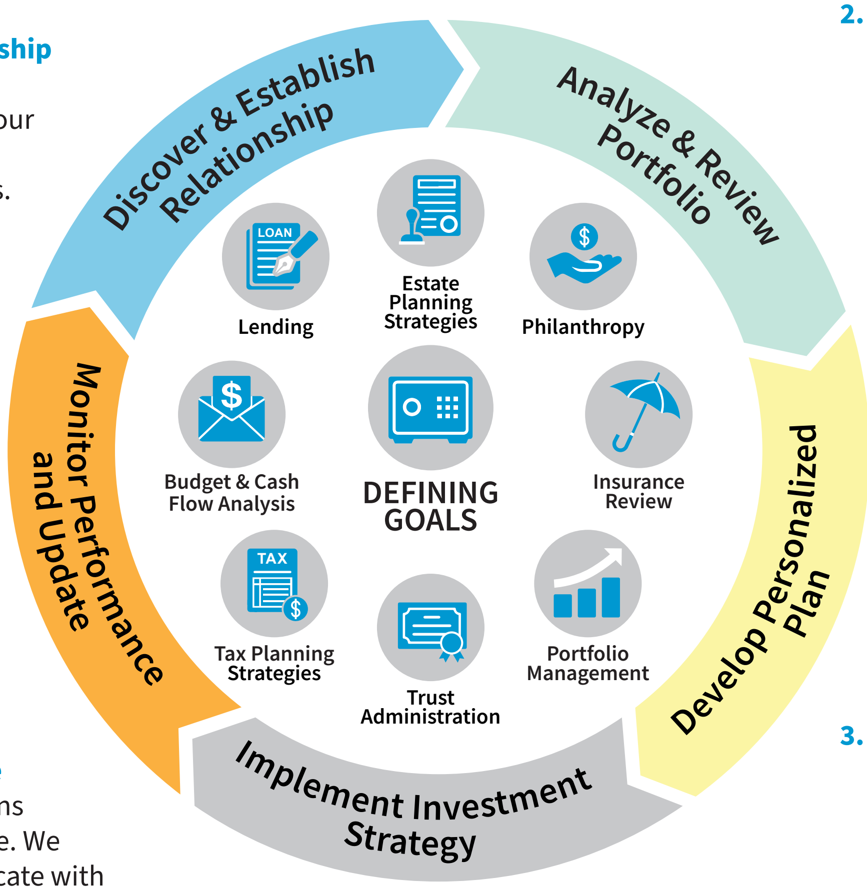
Life is Big. Let's Plan for it.

A Comprehensive Holistic Wealth Management Process

I take a holistic-value added approach to financial planning by looking at the big picture and integrate strategies designed to help grow and preserve your wealth.

1. Discover & Establish Relationship
Develop a deep understanding of your financial goals and learn your concerns.

2. Analyze & Review Portfolio
Gather important data, documents, and financial statements then analyze your current financial situation.



3. Develop Personalized Plan
Put together a customized long-term financial plan that considers taxes, estate planning and risk management.

4. Implement Investment Strategy
Your customized investment strategy may include traditional, ESG, alternative or private equity investments.

5. Monitor Progress & Update
Life is dynamic. Plans and markets change. We regularly communicate with you and make necessary adjustments to ensure you achieve your goals.

Life Events:

Birth | Marriage/Divorce | Death | College Planning | Inheritance/Sudden Wealth | Job/Career Change
Sell Business | Retirement | Health/ Medical Concerns | Aging Parents | Special Needs | Downsizing