



The Conscious Wealth Management Group at Morgan Stanley

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Life is Big. Let's Plan for it.

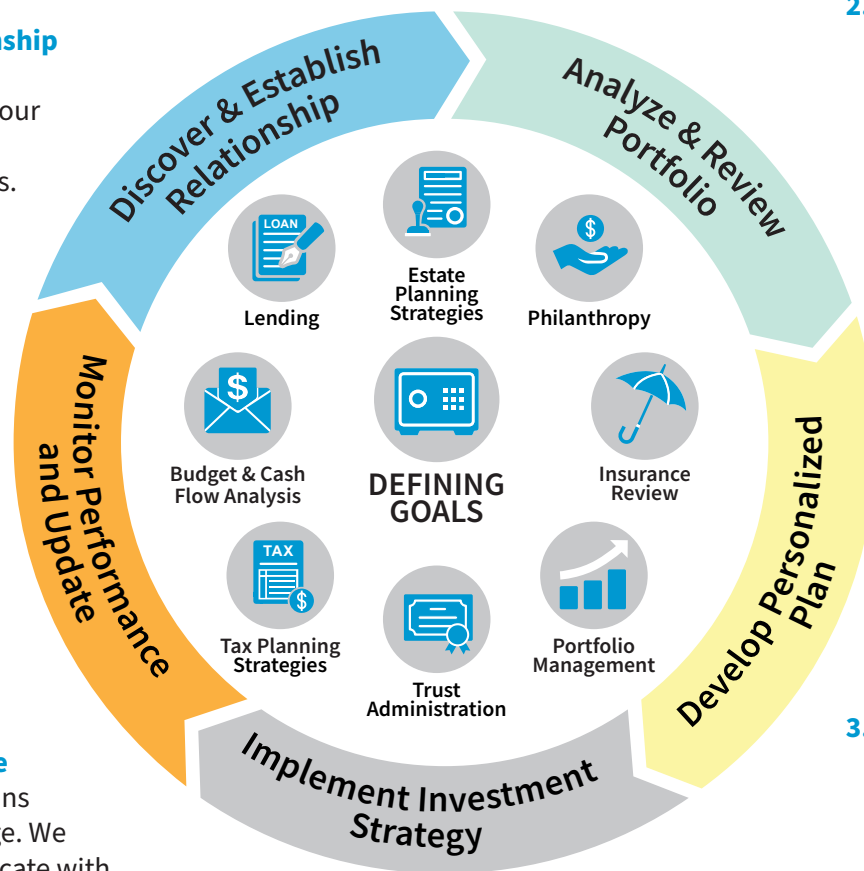
A Comprehensive Holistic Wealth Management Process

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.

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.

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.

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

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