

Family Office Resource Showcase - Solutions that Can Impact Multiple Generations

You're Invited!

Hosted By:



Michael Kislin, CFA, CIMA[®], CFP[®], CDFA^{®*}, CEPA[®]
Senior Vice President, Financial Advisor
Morgan Stanley
2000 Westchester Ave
Purchase, NY 10577
914-225-0262

DATE & TIME

Tue, Sep 24th, 2024
6:00 - 8:00 PM

We are pleased to invite you to join us and a select group of family lawyers, mediators, collaborators, tax accountants/consultants, corporate lawyers, and M&A professionals for passed hors d'oeuvres and drinks while we showcase for you the depth of resources available to you and your clients within Morgan Stanley's Family Office Resource ("FOR") teams.

LOCATION

Please Inquire for Details

FOR delivers comprehensive solutions across a broad range of complex, multi-generational wealth management issues by providing high net worth clients with extensive knowledge, experience, tools, and networking events. The team is comprised of 60+ experienced professionals who work with my team to help better serve our clients.

Our showcase will introduce and highlight several key areas of interest to your clients:

- Wealth and Estate Planning Strategies
- Family Governance
- Wealth Education
- Philanthropy Management
- Lifestyle Advisory
- Trust Services
- Health and Wellness Education
- Morgan Stanley's Global Investment Office, Consulting Group and Alternative Investments Group

Presented By:



Family Office Resources
Angelo J. Loubas
Executive Director
Family Office Resources ("FOR")



Global Investment Office
Sonny Mendez
Vice President
Cross-Asset Investment Strategist



Alternative Investments
Adam Pennacchio
Executive Director
Alternative Investments Distribution ("AI")

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Morgan Stanley Wealth Management
2000 Westchester Avenue, Purchase, NY 10577-2530 USA

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CRC 3809541 08/2024