

Morgan Stanley

December 16, 2020

## Michael Lupia Receives Family Wealth Director Designation

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Melville, NY, 12/16/2020 -- Morgan Stanley announced today that Michael Lupia, a Senior Vice President in the Firm's Wealth Management office in Melville, has earned Morgan Stanley's Family Wealth Director (FWD) designation.

"This is an exceptional achievement for Michael Lupia and an attestation of his commitment to today's high net worth families. Michael Lupia has demonstrated a sophisticated approach to the management of significant wealth that helps to set him apart from others within the industry," said Dino Carfora , Complex Manager.

Designated Family Wealth Directors must demonstrate professional knowledge and experience in a range of wealth management solutions including estate planning strategies, alternative investments, control and restricted securities, lending, hedging and monetization, and business succession planning.

The FWD designation also entitles Michael Lupia to specialized access to a variety of family advisory services including, family governance and wealth education , philanthropy management and lifestyle advisory.

Michael Lupia has been a member of the financial services industry for 30 years. As a Financial Advisor with Morgan Stanley, he offers a full suite of financial planning and investment services to individual clients, institutions, foundations and endowments.

Michael Lupia holds a B.S. in Finance for Fordham University, and is a member of the Firm's Century Club.

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

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CRC 3183124 9/2020

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