Morgan Stanley

Mitch Vigil at Morgan Stanley

December Newsletter

Mitch Vigil, Senior Vice President, Financial Advisor

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As we close out the year, I want to take this opportunity to thank you for being a valued client. Wishing you and your loved ones a wonderful holiday season, filled with health, wealth, and happiness.

Below you can find some timely insights, reminders, and resources as we begin planning for 2025. Feel free to reach out with any questions or to schedule a meeting.

Market Commentary:

As we wrap up the year I'd like to share with you a recent trip I took to visit the MS headquarters in New York City.

In November, the firm flew myself and a few others out to meet with department heads as part of a due diligence trip. The goal was to learn more about what the firm is doing in the background, our capabilities and what sets us apart from others.

•Technology
o The firm spends over $1b on tech each year, from cybersecurity to enhancing the overall client and advisor experiences to our trading platforms.
o Our competitors use third party investment platforms where MS owns and operates their own[1]. This leads to enhanced investment execution, lower costs and more strategic investment process.
o Our cybersecurity department is open 24/7, across the globe to be available to each client if an issue occurs and always on the watch.
o Our security controls and ease of use has always been a focus with a continuation of developments to further monitor and helps protect clients from fraud.

• Investment Advice/Capital Markets
o We are set up to provide comprehensive advice and strategies to help any client situation, size of investment amounts and complexity of anyone's financial picture. With access to industry professionals in every category in the markets
o We have strong relationships with all of our investment providers which allows us comprehensive access to information and offerings.
o Being a leader in advice and technology allows for more customization, monitoring and quality of implementation

• Taxes
o Our tax management investment process and understanding helps provide clients with a clear bottom line.
o We can customize this process for each client to deliver specific outcomes when necessary

• Risk
o The Firm has developed and maintains what is called our Portfolio Risk Platform, which allows us to monitor, test and track risks clients are taking in the market place
o This process looks under the hood on all investment holdings, tests results for various market and economic conditions so we are able to make informed decisions about every piece of investment advice

Overall, I am very happy with the resources, capabilities and the direction of the firm to help deliver potential solutions to my clients.

Written by: Mitch Vigil, Senior Vice President, Financial Advisor at Morgan Stanley

Personal Notes:

While out in NY I was able to connect with Luka who helps put this newsletter together, along with many other things (pictured).

The family and I had the opportunity to go to Sedona, AZ for Thanksgiving with my wife's family. I would recommend going to visit if you have not. Great scenery, hikes and much more that we didn't have time to get into this round. Now time for lots of posole and red chile.

December Insights:

On The Markets: *The Roaring '20s*

Click below to read the 2025 Outlook edition of On the Markets. which discusses the current state of the markets from Morgan Stanley's Global Investment Committee.

December Edition

2025 Global Economic Outlook

Global growth is likely to be around 3% in 2025 and 2026, as tariff and immigration policies begin to slow the U.S. economy late next year, and China's underperformance restrains emerging markets.

Learn More

Technology That Could Define the Decade

Innovation driven by necessity may spark significant breakthroughs by 2030 in areas such as self-driving cars, humanoid robots and AI-assisted fertility.

Read More

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1. MSWM Global Investment Office 2024

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