

# ACCESS

**W**e can help provide you with access to Morgan Stanley resources which are among the most sophisticated and extensive available to individual investors, including institutional strategists, traders, premier managers as well as to other specialized resources throughout the world. Whether you seek in-depth advice on a specialized investment or an unfamiliar opportunity or a thought partner for your own ideas, you can work with some of the world's most respected financial professionals. In managing your wealth we can assist you in creating strategies specially designed for each one of your financial entities and can help you coordinate these strategies with an eye toward managing risk across your holdings. Also available to you are customized

**Morgan Stanley**  
Private Wealth Management

solutions which reflect our reach and resources as a leading global investment bank. We can provide you with access to the personalized resources that are usually associated with family offices, complementing the strength of our investment and institutional offering. You will work with knowledgeable, experienced professionals who understand both the personal and technical dimensions of wealth transfer and estate planning. Specialists in family governance can help you address the intricacies and sensitivities that frequently emerge in wealthy families, developing solutions that help balance divergent goals and competing interests. Additionally, philanthropic advisors can work with you to develop personalized strategies and the appropriate vehicles to support your family's charitable goals.

## **THE RESOURCES AND PERSONALIZED APPROACH OF MORGAN STANLEY PRIVATE WEALTH MANAGEMENT**

Access to global investment banking, corporate finance and capital markets capabilities and expertise of Morgan Stanley

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An integrated approach to planning, including family dynamic, wealth transfer and business succession planning

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An emphasis on generational planning focusing on family mission, governance and conflict management

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A results-oriented approach to investing in charitable organizations, non-government organizations and your community

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Access to specialized resources – art advisory, health, personal security and aircraft financing capabilities.

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