

PERSONAL SERVICE

Our team serves a limited number of clients, ensuring the highest level of personalization and responsiveness. This attentiveness encourages a depth of connection with you, your family and your other advisors that enables us to better appreciate your needs and simplify your financial life. We oversee a wide range of your financial needs, including investments, cash flow, banking arrangement and overall balance sheet. The result is a more complete understanding of your financial life and a greater sense of control. To help ensure that you gain maximum benefit from your relationship, we can assemble

and direct a team with the financial sophistication and experience to address the particular issues and opportunities which are most timely and important to you. When your needs demand deeper expertise, our team has the stature within Morgan Stanley to bring together the world-class resources to address them for you. Working on your behalf, we make it possible for you to devote more time and energy to business matters, your family and the personal interests which are most important to you.

UNCOMPROMISING, COMPREHENSIVE SERVICE

Solutions which help ease administrative burdens across generations – from consolidating your financial reports to managing cash flow, expenses and some of the most complex aspects of your life.

Making life simpler and more enjoyable with a full range of concierge services – from managing travel arrangement to overseeing multiple residences

Integrated custody and reporting services
