Morgan Stanley

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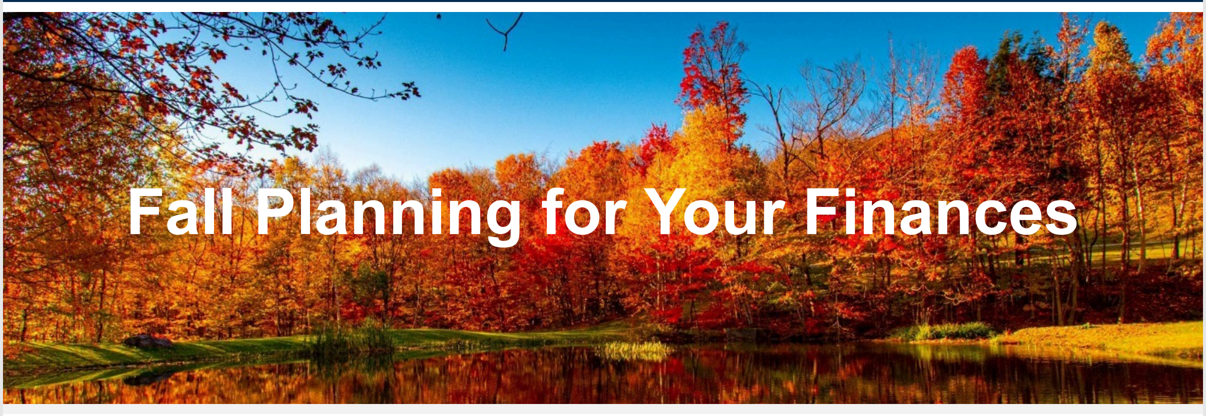
November Newsletter

Happy Thanksgiving!

Wishing you and your family a warm and cheerful Thanksgiving holiday.

This season enjoy time with your loved ones. Thank you for allowing me to help you reach your goals.



As we begin to approach year-end deadlines, may be a great time to check in on your goals for 2025 and begin making preparations for the next year. Below you can find some resources to help you get started.

As always, please reach out if you have any questions or concerns.

Financial Review Checklist

Revisit Your Asset Allocation

The end of the year is a good time to revisit your investment strategy and asset allocation to help ensure your portfolio is still apportioned among asset classes in a way that fits your goals and risk tolerance.

Learn More >

Review Your Financial Plan

It is important to plan for the unexpected. Major life events and market conditions can shift the nature of your financial plan, so it is important to regularly check-in and make sure you're on track.

Learn More >

Identify New Tax-Planning Strategies

Often, some of the smartest tax strategies are put into action well before Tax Day. Learn more about tax-efficient strategies below.

Learn More >

Update Your Estate Plan

Year-end can be a good time to review the changes the past year brought to your family, as well as your overall estate plan to help ensure it still reflects your situation and goals.

Learn More >

Technology and Resources

Security Center

Safeguarding your assets and information is one of our highest priorities, but you also have a critical role to play. Check out our collection of practical takeaways and best practices from our cybersecurity professionals.

Learn More >

eDelivery

eDelivery provides you with the ability to view statements and other documents electronically in lieu of paper. Clients who are registered in Morgan Stanley Online may enroll in eDelivery.

Learn More >

How to Access Your Tax Forms

1. Log into your account via Morgan Stanley Online
2. Click the Accounts tab
3. Select the Documents tab
4. Go to the Statement drop-down tab
5. Select Tax Documents and download them

Click Here to Login to Morgan Stanley Online >

Podcast: What Should I Do With My Money?

On this award-winning podcast, we match real people, asking real questions about their money, with experienced Financial Advisors. From prenups, to passing a legacy to their children, from affording a dream home, our guests discuss what matters the most to them and you get answers to some of the questions you might have yourself.

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