Pinnacle View Wealth Management

Winter Newsletter 2026

This quarter we are thrilled to introduce the most recent addition to our service team, Registered Client Service Associate, Max Dunlap. He joins us from another department within Morgan Stanley and will be working alongside Jera and David[1] to support all of your service needs. Read on to learn more about Max and also to gather a few insights for the year ahead. As always, don't hesitate to reach out with any questions.

Team Member Spotlight: Max Dunlap

My Role on the Team:

Registered Client Service Associate

As a Registered Client Service Associate, my role focuses on the service and support side of our team, ensuring clients receive a consistent and robust experience. With my four years of experience within Morgan Stanley at Work as a Participant Relationship Manager and a Team Lead, I have a strong background in client service and ensuring our clients' needs are not just met but exceeded.

What makes you passionate about work?

I enjoy finding solutions and helping individuals work through complex situations. Working in wealth management involves both the challenge and satisfaction of helping individuals make progress toward achieving their goals, despite the many unique challenges they face.

Hobbies & Interests:

When I am not in office, some of my favorite hobbies are cooking, swimming, golfing and gardening. I also enjoy watching sports, such as baseball and football, with friends and family. Recently, I have been enjoying traveling more to learn and be exposed to different cultures and beliefs to help grow as an individual.

Personal Life:

I currently live alone but cultivate a community of friends and neighbors I enjoy spending time with. With my family being in Hawaii, I do my best to connect with them on a regular basis, host my parents for Thanksgiving and visit them for the holidays.

New Year Insights & Resources

5 Personal Money Moves for the New Year

Heading into 2026, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These five steps can get you started.

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Financial Literacy for Any Stage of Your Life

Financial literacy means being equipped with the knowledge to help make smart financial decisions during every stage of your life. No matter your current priorities, a strong financial literacy foundation can help you meet your goals.

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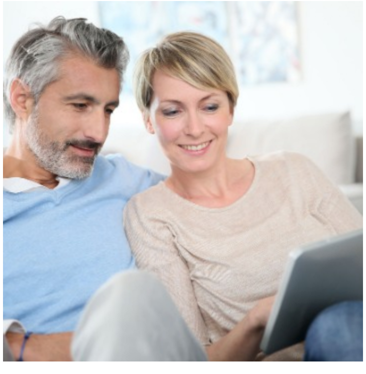

Maximum Benefit and Contribution Limits for 2026

The IRS has increased contribution limits for 2026. Click below for a detailed list of all the new contribution limits.

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Pinnacle View Wealth Management Group
at Morgan Stanley

Our Website

Login to your MSO Account

1. Jera Cain, Portfolio Associate, David Seay, Wealth Management Associate

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