The Alexander Group at Morgan Stanley

Why Clients Choose Us
We help simplify investing so clients can focus on their family, career, & life. We align investment strategies with clients’ goals to improve the likelihood of success. Our clients know that several moving parts of their life sometime lead to confusion, complexity, and often inefficiency: they know we can help.

Meet Our Team

Christopher S. Alexander, CIMA®
Financial Advisor, Managing Dir.
- Joined Morgan Stanley in 1991
- B.S. Business Admin./Finance, University of Southern California
- Morgan Stanley Chairman’s Club 2010–’14, President’s Club 2015–’17
- Member of USC Cardinal & Gold, Manhattan Country Club, & American Martyrs

Jeremiah S. Miller, CRPS®
Financial Advisor, Associate VP
- Joined Morgan Stanley in 2012
- B.S. Politics, Princeton University
- President, Princeton Club of Southern California
- Morgan Stanley Pacesetters Club ‘17
- Member of Aerospace and Defense Forum Steering Committee, Pacific Crossroads Church

Facts
- $400M+ assets under management & ~$130M in retirement plan assets (April ‘18)
- 55 years combined industry experience
- Top decile firm-ranking 8 consecutive years
- Morgan Stanley #1 Rankings: Managed Assets (Advisory accounts*), Executive Stock Plans**, Global Equity IPOs (2017)

Why Clients Choose Us
You’ve worked hard to build a successful career, business, and life for you and your family. We work with individuals and families from several walks of life with one common theme: recognition that their wealth is best managed alongside a skilled team that delivers ideas. At this stage, a trusted advisor can help you manage and enhance your wealth, and align investments with your long-term goals in a tax-efficient way.

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Connect
Share your questions & expectations to see if we’re a good fit.

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Providing more than just stocks and bonds...

Planning
• Goal-Centric Planning (Retirement, Philanthropy, Wealth Transfer, etc.)
• Trust Services
• Life Insurance and Long-Term Care

Advising
• 529 Plans & Health Savings Accounts
• Commercial & Residential Lending
• Cybersecurity and Fraud Protection
• Concentrated stock positions

Investing
• Tax-optimization (allocation, withdrawals, gifting/donations)
• Passive & Active Strategies
• Alternative Investments

Preparing for various goals requires more than simply repositioning your portfolio. Comprehensive advice is a key component of success.

“In real terms, an experienced financial advisor can offer the strategic planning, discipline, and monitoring that can add up to 3% of net return to your portfolio, further positioning you for long-term success.”***

We seek to offer clarity toward personal & financial goals, and have built a generational practice to help families for several years. Our success is directly proportional to our clients’.

*Cerulli Associates, 4Q 2017 Summary
** Washington Service, Managed assets governed by Rule 144 (restricted, control, and concentrated stock positions), www.washingtonservice.com
***Vanguard, Putting a value on your value: Quantifying Vanguard Advisor’s Alpha, March 2014
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