The Alexander Group at Morgan Stanley

Christopher Alexander — Financial Advisor, Managing Director, Family Wealth Director
Jeremiah Miller — Associate Vice President, Financial Advisor
Mission

We understand our business impacts clients' lives. We offer clarity toward personal & financial goals, and have built a generational practice to help individuals and their families for several years ahead. Helping clients accomplish their objectives is how we measure our success.
The Alexander Group at Morgan Stanley

What We Do

We help simplify investing so clients can focus on their family, career, & life. Goals and objectives require preparation. We align investment strategies with clients’ goals to improve the likelihood of success.
COMPREHENSIVE CAPABILITIES

ACCESS TO CASH MANAGEMENT AND LENDING PRODUCTS AND SERVICES
- Securities-Based Lending
- Residential Mortgage Lending
- Tailored Lending
- Cash Management Services
- Referrals to External Providers with Preferred Programs: Aircraft and Yachts

INVESTMENT MANAGEMENT
- Assistance with your investment Policy Statement
- Asset Allocation
- Portfolio Construction and Management
- Open Architecture Platform
- Morgan Stanley Proprietary Investment Opportunities
- Exclusive Co-investment Opportunities
- Money Manager Due Diligence Analysis
- Alternative Investments

RISK MANAGEMENT
- Hedging Strategies
- Concentrated/Restricted Stock Advice
- Interest Rate Risk Management
- Currency Exposure Strategies
- Portfolio Protection Solutions
- Insurance Solutions

TRUST, ESTATE & LEGACY PLANNING
- Wealth Transfer and Trust Strategies
- Current Will, Trust and Insurance Review
- Foundation and Other Charitable Giving Strategies
- Coordination with Outside Legal and Tax Advisors
- Offers a robust donor advised fund ("Morgan Stanley GIFT")

CORPORATE EQUITY SOLUTIONS
- Directed Shares, Stock Plans, 10b5-1 Programs
- Cash Management Services
- Retirement and Pension Plans

FINANCIAL PLANNING
- Goals-Based Planning (Retirement, Education Funding, Philanthropic, Wealth Transfer)
- Cash Flow Planning

FAMILY WEALTH ADVISORY SERVICES
- Family Governance and Dynamics
- Philanthropy Management
- Lifestyle Advisory
- Educational Programs

ONLINE & MOBILE APP CAPABILITIES
- Manage Accounts Online
- Trade Securities, Transfer Funds, and Pay Bills Online
- OneView
- eDelivery
- Mobile App available for iPhone®, iPad® and Android™

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Past performance is no guarantee of future results. Estimates of future performance are based on assumptions that may not be realized. This material is not a solicitation of any offer to buy or sell any security or other financial instrument or to participate in any trading strategy. Please refer to important information, disclosures and qualifications at the end of this material.
Who Is The Alexander Group?

Christopher S. Alexander, CIMA®, Family Wealth Director
- Joined Morgan Stanley in 1991
- B.S. Business Administration-Finance, University of Southern California
- Member: Morgan Stanley Chairman’s Club 2010-2014, President’s Club 2015-2017
- Member: USC Cardinal & Gold, Manhattan Country Club, American Martyrs Church

Jeremiah S. Miller, Associate Vice Pres., CRPS®, Financial Planning Specialist
- Joined Morgan Stanley in 2012
- B.S. Politics, Princeton University
- President, Princeton Club of Southern California
- Member: Board of Silicon Beach Young Professionals, Aerospace and Defense Forum Steering Committee, Pacific Crossroads Church – Usher Captain

With over $400M in assets under management and ~$120M in retirement assets held away from the firm as of January 2018, The Alexander Group at Morgan Stanley offers clients comprehensive & customized investment management services.
Your Advisor

Chris graduated from USC in 1991 and immediately pursued his financial advisory career at Morgan Stanley in Santa Monica. He then earned his Certified Investment Management Analyst® (CIMA®) designation from The University of Pennsylvania's Wharton School, and is a member of Morgan Stanley's Presidents Club (2015-17). In 2014, Chris became Managing Director, and earned Family Wealth Director designation in 2015, an achievement held by ~300 advisors nationwide.

Clients share a broad range of topics that influence their future—from family situations to career aspirations, education expenses to ideal retirements. What is shared becomes the foundation for The Alexander Group to build a client-specific portfolio: how much risk makes sense, proper asset allocation, and which investments may be appropriate.

Areas of Focus: Discretionary Investment Management, Alternative Investments, Syndicate Offerings, Private Equity

Christopher Alexander, CIMA ®
Managing Dir., Family Wealth Director
310-319-5230
christopher.alexander@ms.com
Your Advisor

Jeremiah joined Morgan Stanley in 2012, where he utilizes firm resources to bring ideas to clients, particularly business owners and executives. Jeremiah’s team, The Alexander Group at Morgan Stanley, oversees and manages $500M+ of investments for clients. Jeremiah is also a Chartered Retirement Plan Specialist®, a certification that allows him to help maximize retirement plan benefits for sponsors, owners, and employees. A native of Pittsburgh, he earned a scholarship to Princeton University where he played varsity football and graduated with a B.S. in Political Science. Jeremiah volunteers as President of Princeton’s local alumni group, church usher & finance committee member, and steering committee member of The Aerospace & Defense Forum. Outside the office he enjoys mountain biking, health and nutrition, motorcycling, diving, and volunteering.

Areas of focus: Rollovers, Portfolio Management, Individual & Business Retirement Plans (401K/Profit Sharing/Cash Balance/Deferred Compensation), Access to Lending Services

Jeremiah Miller, CRPS ®
Associate Vice President, Financial Planning Specialist
310-319-5278
jeremiah.miller@ms.com
Your Support

Joshua Dopp – Client Service Associate
Joshua graduated from California State Polytechnic University (Pomona) in 2006 where he majored in Finance. After graduation, he began his financial services career in operations, and quickly advanced to Operations Manager at Oppenheimer. He joined Morgan Stanley in June 2013 and The Alexander Group in April 2015. He currently resides in Long Beach with his wife and newborn baby girl, Brooklynn. He enjoys outdoor activities such as hiking and snowboarding.
Areas of Focus: Account Operations, Syndicate Offerings

Griselda Hernandez – Client Service Associate
Griselda graduated from California State University Northridge in 2009 where she majored in Business Administration with a focus on Business Law. While attending college, she worked for JP Morgan Chase as an Assistant Branch Manager, and before joining Morgan Stanley worked for the Department of Public Social Services in Los Angeles County. She joined Morgan Stanley in May 2014 and The Alexander Group in September 2015. Outside the office, she enjoys traveling and spending time with her husband and two young children. Griselda currently resides in Granada Hills, CA.
Areas of Focus: Financial Planning & Analysis, Account Administration
“The most important key to achieving great success, is to decide upon your goal and launch, get started, take action, move.”

- Brian Tracy

Call us to learn how we can simplify your finances and let you focus on your life.

Christopher.Alexander@ms.com  •  310-319-5230
Jeremiah.Miller@ms.com  •  310-319-5278
1453 Third St., Suite 200, Santa Monica, CA 90401
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