Morgan Stanley Wealth Management

The AuYeung Wealth Management Group at Morgan Stanley Quarterly Newsletter

Pictured (from left to right): Dante Collins, Financial Advisor; Grace Ma, Senior Registered Associate; Jestin Chang, Financial Advisor; Jeremy Belnas Financial Advisor; Frank AuYeung, Financial Advisor; John Zhong, Financial Advisor; Erika Tong, Wealth Management Associate; Judy Fang, Client Relationship Manager

As we reach the halfway point of 2025, now is an ideal time to pause and take stock of your financial goals. Market dynamics, legislative updates, and personal milestones can all shift the landscape over the course of a year - and a midyear review ensures your strategy remains aligned with what matters most to you.

Our team has curated a selection of new ideas, the latest research from Morgan Stanley, and resources to help you stay informed and navigate the road ahead. As always, if you have any questions on the topics below, please do not hesitate to reach out to one of our team members.

Visit Our Website

View Our Team Fact Card

Summer Team Spotlight

Giving Back to Our Community

At Morgan Stanley, giving back is an integral part of our culture. During Global Volunteer Month in June, Morgan Stanley kicks up its efforts, leveraging the power of our employees to strengthen the impact we can make with nonprofits around the globe.

This past month, our team participated in a volunteer event at West Valley Community (WVC) Services, a nonprofit organization dedicated to fighting poverty by providing essential services such as food, housing support and financial assistance to low-income and homeless individuals in the West Valley region. We are so grateful for the opportunity to work with such a great organization!

Mid-Year Tips & Resources

On the Markets: The New Bull Market

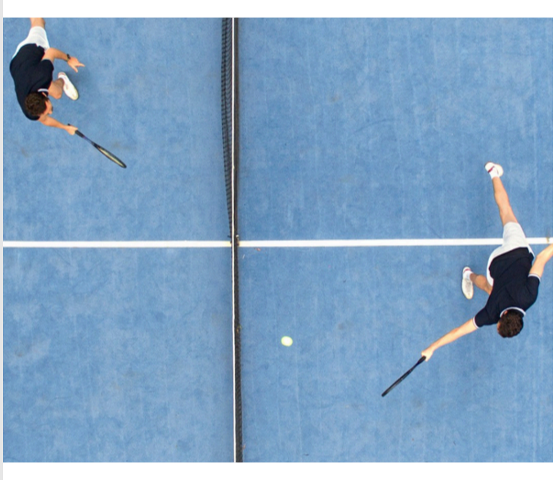
With positive market momentum likely to remain in the near-term, consider how to position for the remainder of summer. Find out more in July's edition of On the Markets.

Read Here

Mid-Year Financial Planning Checklist

Changes in the market or shifts in your personal circumstances may require adjustments to your financial plan. Here's a mid-year checklist to help get you started.

Get Started



Want to Keep More of Your Investment Returns? Consider These Tax Moves

Establishing a tax management strategy for your investments may help you keep more of your returns. Here are some year-round moves you can make.

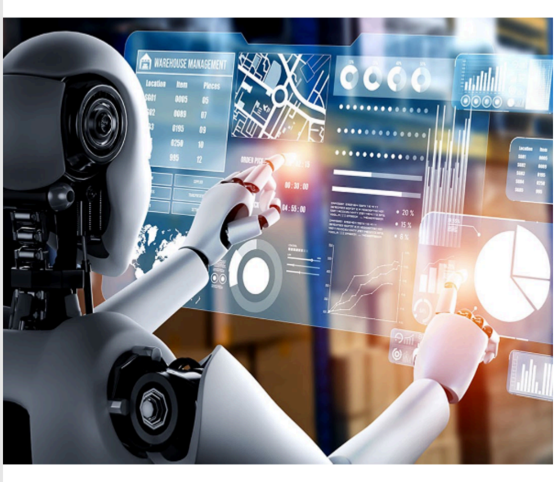
Learn More

Morgan Stanley Tech & Research

Stay Cybersafe on Vacation

Whether your travel plans include a beach vacation with your family, a romantic getaway to Europe or city escapades with friends, consider taking these steps to help protect your cybersecurity while you're away from home.

Learn More



The Robots are Coming

Adam Jonas, Morgan Stanley's Head of Global Autos and Shared Mobility Research, discusses the fast transition of artificial intelligence into the physical world in the form of humanoid robots.

Learn More

Snowflake CEO on AI's Future: Unified Data, Sovereign Clouds and Leaner Models

Sridhar Ramaswamy shares the ways that AI is shifting to create long-term value for companies and governments.

Learn More

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