

Morgan Stanley

PRIVATE WEALTH MANAGEMENT

CONCIERGE AND LIFESTYLE ADVISORY SERVICES

The BlueStone Wealth Management  
Group at Morgan Stanley

FAMILY OFFICE SERVICES

# Concierge and Lifestyle Advisory Services

Providing the Services That Enhance and Enrich Your Life



## Art Advisory and Finance—Assisting Individuals, Trusts, Estates and Foundations



## Home Advisory

Home management can become less stressful and more rewarding. Simplify complicated home management logistics with the partnership of best-in-class professionals.



## Property and Casualty

As wealth builds, property and responsibilities grow and change. Many times we find that clients have not orchestrated a structured solution for managing risk and liabilities. Unfortunately, this can lead to oversights and gaps. Our referrals can create tailored solutions for client needs.

Have you recently:

- Gone through a liquidity event or separated from professional service?
- Purchased a new or vacation home, yacht, aircraft, art or significant jewelry?
- Become a board member?
- Started hosting events at your home?



## College and Admissions Counseling

Being an “academic animal,” a “legacy” or an athlete surely going “pro” is no longer a mandate for entry to a first-choice college or university. There is a lot going on behind the scenes when a board sits down to make acceptance decisions. Getting into the “right” college for a graduate should be a well-thought-out endeavor.

We have referral relationships with two of the highest-ranked facilitators in the space.



## Multihome and Estates Management

- Asset management of valuable home furnishings
- Assistance with confidential recruitment of household staff
- Relocation specialists: craters, freighters and shippers



## Personal and Home Security

Whether an executive, entrepreneur, athlete or entertainer, the fact is that our clients are attractive targets to criminal elements.

The right referral can provide:

- Assured confidentiality
- Pre-emptive family training
- Residential security architecture
- Immediate incident response
- International travel intelligence
- Investigative due diligence
- Executive protection
- Technical surveillance countermeasures



## Pinnacle Care Private Health Advisory

Pinnacle Care helps clients navigate the complexities of health care systems worldwide

- Unsurpassed access to world-renowned specialists and medical centers
- Objective information
- Preventative care
- Medical research on treatment options and medical advances
- Collection and electronic medical records storage
- Support worldwide during travel or emergency situations



## Entertainment and Experience

We can be your ticket to an array of entertainment, travel and bespoke experiences. Our introductions provide ease in handling the needs of the affluent family. With the right referral, a phone call leads to a ticket to a sold-out event or a travel experience turns into a trip of a lifetime.

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### FAMILY OFFICE SERVICES

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