Morgan Stanley

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Client Resource Guide





Bruce A. French Financial Advisor Executive Director Family Wealth Advisor

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Contact Bruce To:

- -Discuss your investment goals including life changes
- -Plan for retirement
- -Explore investment strategies for your portfolio
- -Create an individualized wealth plan



Sandra Lutkenhoff, CFP® Financial Advisor

Senior Vice President

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Contact Sandy To:

- -Discuss your investment goals including life changes
- -Plan for retirement
- -Explore investment strategies for your portfolio
- -Create an individualized wealth plan



Matthew Sebastian

Financial Advisor Vice President Portfolio Manager Insurance Planning Director

P: 248.218.8249 M: 248.978.2264 E: matt.sebastian@morganstanley.com NMLS 2319515

Contact Matt To:

- -Discuss your investment goals including life changes
- -Plan for retirement
- -Explore investment strategies for your portfolio
- -Create an individualized wealth plan



Amanda Henderson, QPFC

Financial Advisor Financial Planning Specialist

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Contact Amanda To:

- -Discuss your investment goals including life changes
- -Plan for retirement
- -Explore investment strategies for your portfolio
- -Create an individualized wealth plan



Amy D. Irish

Wealth Management Associate Financial Planning Specialist

P: 248.218.8226 M: 248.978.5259 E: amy.irish@morganstanley.com

Contact Amy To:

- -Explore cash management and lending solutions
- -Receive Morgan Stanley Online & App Support
- -Create an individualized wealth plan
- -Receive Morgan Stanley Online & App Support



Logan Oates

Client Service Associate

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Contact Logan To:

- -Update beneficiaries
- -Make IRA contributions/distributions
- -Report suspicious/fraudulent activity
- -Receive Morgan Stanley Online & App Support

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