Morgan Stanley | Wealth Management

The Boston Center Group at Morgan Stanley

Securing Your Legacy

Wednesday, June 12th 4:00 pm ET on Zoom

The Boston Center Group is excited to share the next installment of our 2024 webinar series. We will be discussing estate planning and wealth transfer strategies with Ken Johnson, Wealth and Estate Planning Strategist for Morgan Stanley's New England Region.

Ken works with Morgan Stanley's Financial Advisors and their high-net-worth clients to develop Wealth Management Plans that incorporate comprehensive financial and estate planning strategies.

Please join us for a practical and informative discussion to learn how these strategies can help you pass along your legacy and values to the people and causes that matter most.

Join us for an informative webinar that will explore:

- The Importance of Estate Planning
- Common Reasons People Establish Trusts
- Strategies to Minimize Taxes

If you have a specific question you would like to ask in advance, please email: BCG@ms.com.

RSVP Here | **More Information**

Host:

David Typermass, CFA, CDFA
Financial Advisor, Portfolio Manager

Speakers:

Ken Johnson
Executive Director, Wealth and Estate Planning Strategist

Prior to joining Morgan Stanley, Ken served as chairman of the trusts and estates group at the Boston law firm of Burns & Levinson LLP. He has over 20 years of experience as an attorney representing individuals and business clients in connection with the development and implementation of sophisticated estate planning documents and techniques. Ken has also been involved in the administration of numerous estates and trusts. He has represented clients before the Internal Revenue Service and state tax authorities.

Ken holds a Bachelor of Arts degree in economics from Brown University. He received his law degree from Suffolk University Law School and a Master of Taxation Law degree from Boston University School of Law. He is admitted to practice in the Commonwealth of Massachusetts, the First Circuit United States Court for the District of Massachusetts, and the United States Tax Court.

We hope that you can join us!

Visit Our Website

Picured L to R: Todd Mulligan(Finacial Advisor),David Typermass (Financial Advisor),Jaclyn Claus (Registered Client Service Associate),Stephen Fitzmaurice (Financial Advisor),Yvette Sekyere-Abankwa(Portfolio Associate),Kyle Cox(Financial Advisor)

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