

## The Boston Center Group at Morgan Stanley



## Understanding Equity Compensation

Tuesday, April 30st, 4:00 pm EST on Zoom

The Boston Center Group is excited to share the next installment of our 2024 webinar series. We will be discussing equity compensation with Michael Blackburn and Jeff Holzbach from the Morgan Stanley Equity Planning and Education Center (EPEC).

The EPEC group is a planning team that has a highly specialized focus on equity compensation planning. They help people to understand, plan and take action on their equity compensation awards. The team members are all CFP® Practitioners and have over 60 years of combined financial planning experience and over 50 years of equity compensation planning experience.

### Join us for an informative webinar that will explore:

- What are Restricted Stock Units
- What are Stock Options
- Lifecycle of Equity Compensation
- Tax Implications and Considerations

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

#### DATE & TIME

4/30/2024  
4pm - 5pm EST

#### LOCATION

Zoom Webinar

[Register Here >](#)

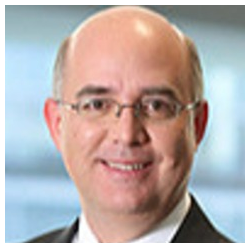
#### Host:



#### Todd J. Mulligan, CFA, CFP®, CAIA

Senior Vice President, Financial Advisor  
Workplace Advisor - Equity Compensation

#### Speakers:



#### Michael Blackburn, CFP®

Vice President, Sr. Equity Planner  
Morgan Stanley at Work | Equity Planning & Education Center



#### Jeff Holzbach, CFP® CEP

Vice President, Sr. Equity Planner  
Morgan Stanley at Work | Equity Planning & Education Center

## We hope that you can join us!



[Visit Our Website](#)

Pictured L to R: Todd Mulligan (Financial 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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