

Morgan Stanley

The Boston Center Group at Morgan Stanley

Team Profile and Experience

APRIL 2025

Our Team at a Glance

100+

YEARS OF COMBINED
EXPERIENCE



INDUSTRY RECOGNITION &
AWARDS



MULTIPLE INDUSTRY
CERTIFICATIONS



INVESTMENT
ADVICE &
MANAGEMENT



WEALTH
PLANNING



ASSET
PROTECTION



PRIVATE
BANKING



PHILANTHROPIC
SERVICES



TRUST &
LEGACY
PLANNING

Wealth Management Services



WEALTH PLANNING

- Retirement Planning
- Lifestyle Review
- Budget & Cash Flow Analysis
- Education Planning
- Employer Benefits Analysis
- Divorce Financial Planning



INVESTMENT MANAGEMENT

- Risk Tolerance Assessment
- Asset Allocation
- Portfolio Construction & Management
- Investment Manager Selection
- Asset Location Analysis
- Ongoing Investment Monitoring



PRIVATE BANKING

- Cash Management
- Liability Analysis
- Home Loans
- Securities-based Lending
- Tailored Lending
- Digital Banking Tools



ASSET PROTECTION

- Risk Analysis
- Life Insurance
- Disability Insurance
- Long Term Care Insurance
- Cybersecurity & Identity Protection
- Property & Casualty Analysis



ESTATE PLANNING

- Asset Titling & Beneficiary Review
- Wealth Transfer Strategies
- Wills, Trusts, POA, & Health Care Proxy
- Estate Tax Minimization Strategies
- Legacy Planning
- Philanthropy Services

Our Team



STEPHEN FITZMAURICE, CFP®, CPWA®, CIMA®, CRPC®, CLTC

Family Wealth Director

Executive Director, Financial Advisor, Senior Portfolio Management Director

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Years of Experience: 22

Years at Morgan Stanley: 18



Biography

Outside the work he does with clients, Steve volunteers his time at several non-profit organizations. He is a member of the Boston Estate Planning Council and he previously served as a Trustee and Chair of the Audit and Finance committee at School's for Children, Inc., a Massachusetts non-profit providing educational programs to children. Steve also served on the advisory board for Lasell College's Accounting and Financial Department and was a board member and volunteer coach for Needham Baseball & Softball for many years.

Steve graduated from Providence College and currently holds his CIMA® designation by successfully completing the Investments & Wealth Institute's Certified Investment Management Analyst Program at The Wharton School, University of Pennsylvania. He also earned the CPWA® designation by completing the Certified Private Wealth Advisor® Certification Program through the University of Chicago Booth School of Business. In addition, Steve obtained his CERTIFIED FINANCIAL PLANNER™ certification in 2012. Steve has spoken at seminars and Morgan Stanley conferences on topics such as Asset Allocation, Portfolio Construction and Fixed Income Investing. Steve was named to the 2021-2025 Forbes Magazine's List of *Best-in-State Wealth Advisors* for Massachusetts and the team was selected by Forbes Magazine as a *Best-in-State Wealth Management Team in 2023-2025*. He was named a 2024 Five Star Professional Wealth Manager and was featured in the February 2024 issue of *Boston* magazine. This is the eleventh consecutive time that Steve has achieved this respected award.

- Forbes Best-In- State Wealth Advisors (Awarded 2021-2025) and Forbes Best-In-State Wealth Management Teams (Awarded 2023-2025); Source: Forbes.com Data for Forbes Awards compiled by SHOOK Research LLC based 12-month period concluding in June of year prior to the issuance of the award. [Awards Disclosures](#)
- Five Star Wealth Manager Award. Source: fivestarpromotional.com (Awarded 2014-2024) These awards were determined through an evaluation process conducted by Five Star Professional, based on objective criteria. Please see page 13 for specific evaluation periods for each year's award.

Our Team



TODD J. MULLIGAN, CFP®, CFA, CAIA

Senior Vice President, Portfolio Management Director, Financial Advisor

Phone: (781) 431-6768

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Years of Experience: 19

Years at Morgan Stanley: 10



Biography

Todd focuses on creating and implementing comprehensive financial plans and investment strategies for high net-worth individuals and families. Working with his clients, and other subject matter experts, Todd helps to coordinate solutions to clients' toughest financial challenges.

Todd also teaches Investment Planning at Boston University focusing on investment and risk management, and portfolio construction strategies. In addition to teaching, Todd has also served as a consultant to multiple publishing companies editing books on financial planning and investment management topics.

Recently, Todd was asked to volunteer on the CFA Institute's Global Private Wealth Management panel where he was tasked with shaping content on advanced wealth planning strategies that will be integrated into future CFA exams. Prior to Morgan Stanley, Todd worked at Fidelity Investments as a Vice President, Financial Consultant in Fidelity's Private Client Group.

In 2023, Todd was selected by Forbes Magazine as one of the "Top Next-Gen Best-in-State Wealth Advisors" and the team was selected by Forbes Magazine as a "Best-in-State Wealth Management Team". Todd holds the CERTIFIED FINANCIAL PLANNER™ and Chartered Financial Analyst designations, as well as the Chartered Alternative Investment Analyst designation. These advanced certifications demonstrate his commitment to ongoing education and a focus on helping to provide valuable insight on a wide variety of client concerns and circumstances.

Todd lives in Medfield, MA with his wife Jessica and children Zachary and Emilia. Outside of the office, Todd enjoys rooting for New England sports teams, running, reading, and time with his family. Todd graduated from Colgate University, where he played Division 1 college football.

- Forbes Top Next-Gen Wealth Advisors Best-in-State (Awarded 2023) and Forbes Best-In-State Wealth Management Teams: (Awarded 2023) Source: Forbes.com. Data for Forbes awards compiled by SHOOK Research LLC based 12-mo period concluding in June of year prior to the issuance of the award. [Awards Disclosures](#)

Our Team



DAVID TYPERMASS, CFA, CDFIA®

Vice President, Financial Advisor, Portfolio Manager

Phone: (781) 431-6771

David.Typermass@morganstanley.com

Years of Experience: 26

Years at Morgan Stanley: 09



Biography

David focuses on building customized investment portfolios and wealth planning strategies for his high net worth and divorce clients. A graduate of Stanford University (cum laude) and Cornell Law School, David worked for over 10 years as a divorce attorney before joining Morgan Stanley in 2016. As a former practicing family law attorney and Certified Divorce Financial Analyst® David uses his knowledge of the divorce process to help clients navigate the financial aspects of their divorce and establish a post-marriage financial plan.

Knowing how emotional and stressful life changing events can be, David begins each relationship making sure to capture a complete understanding of his client's individual needs and financial situation. He works closely with their attorneys, CPAs and other advisors to help answer his client's questions, resolve their issues and provide creative and well thought out solutions to their unique problems. David is passionate about providing each client with a customized financial plan and personalized investment strategy to help them achieve financial independence and realize their life goals. He prides himself on providing every client with the highest service model and personal attention.

Prior to joining Morgan Stanley, David worked as an attorney and as a research analyst covering the fixed income and equity securities of both public and privately held companies. He became a CFA® charterholder in 1999, is a member of the Boston Estate Planning Council, and a non-practicing member of the Boston Bar Association, the New York Bar Association, and the State Bar of California.

David lives in Needham with his wife Crystal and their daughter Margot. On weekends he enjoys spending time with friends and family, playing golf, and combing the beaches of Cape Cod.

- Forbes Best-In-State Wealth Management Teams (Awarded 2023-2024); Source: Forbes.com Data for Forbes Awards compiled by SHOOK Research LLC based 12-month period concluding in June of year prior to the issuance of the award. [Awards Disclosures](#)
- Five Star Wealth Manager Award. Source: fivestarpromotional.com (Awarded 2023-2024) These awards were determined through an evaluation process conducted by Five Star Professional, based on objective criteria. Please see page 13 for specific evaluation periods for each year's award.

Our Team



KYLE COX, CFA

Vice President, Financial Advisor, Portfolio Manager

Phone: (781) 431-6758

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Years of Experience: 19

Years at Morgan Stanley: 09



Biography

Kyle forms personal relationships with his clients to discover the specific goals they have set for themselves and their families. Whether their hopes are to retire early or to financially support loved ones, Kyle leverages his over 19 years of experience in the financial industry to help clients stay on track through market cycles.

Kyle grew up outside Chicago before heading east to earn his B.A. in Economics at Trinity College, where he was a pitcher on the baseball team. Prior to Morgan Stanley, he worked as an equity analyst and portfolio manager at Hagin Investment Management, a New York City based hedge fund. During that time, he became a CFA® charter holder.

Kyle is a member of the Boston Estate Planning Council. Kyle is honored to have the Boston Center Group at Morgan Stanley selected by Forbes Magazine as a *Best-in-State Wealth Management Team in 2024 and 2025*. In his spare time, he enjoys traveling with his family, playing golf, and skiing. During the summer he tries to relive his glory days as a college pitcher by patrolling right field in the Brookline men's softball league. He and his wife, Jamie, live in Wellesley and have three children, Jake, Charlotte, and Reese.

- Forbes Best-In-State Wealth Management Teams (Awarded 2023-2024); Source: Forbes.com Data for Forbes Awards compiled by SHOOK Research LLC based 12-month period concluding in June of year prior to the issuance of the award. [Awards Disclosures](#)
- Five Star Wealth Manager Award. Source: [fivestarpromotions.com](https://www.fivestarpromotions.com) (Awarded 2023-2024) These awards were determined through an evaluation process conducted by Five Star Professional, based on objective criteria. Please see page 13 for specific evaluation periods for each year's award.

Our Team

Client Support and Service



YVETTE SEKYERE-ABANKWA

Portfolio Associate, Financial Planning Specialist

Phone: (781) 672-5190

Yvette.sekyere-abankwa@morganstanley.com

Years of Experience: 23

Years at Morgan Stanley: 15

Biography

Yvette has over 20 years of experience in the financial services industry. She originally joined Morgan Stanley in 2007. Prior to Morgan Stanley, Yvette worked at Merrill Lynch, in New Jersey, then Massachusetts, where she held positions in Retirement planning products and Branch operations. Yvette is currently a Portfolio Associate and Financial Planning Specialist. She holds a Bachelor's of Science in Computer Science & Physics from University of Ghana and a Master's in Business Administration from Rutgers Business School in New Brunswick, NJ. Yvette lives in Shrewsbury with her husband and their son.



JACKIE CLAUS

Portfolio Associate

Phone: (781) 431-6707

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Years of Experience: 17

Years at Morgan Stanley: 6

Biography

With over seventeen years of experience working in private banking and financial service, Jackie strives to deliver exceptional service to each client. Jackie joined Morgan Stanley from Boston Private Wealth, where she assisted the clients of Senior Wealth Advisors and Fixed Income Portfolio Managers. Jackie graduated from Fairfield University. She lives in Walpole with her husband and two children, and enjoys spending time with family and friends

Morgan Stanley Resource

Trust Specialist



CHRIS SMITH

Executive Director, Head of Trust Services

Phone: (914) 225-6307

Christopher.smith@morganstanley.com

Years of Experience: 25+

Years at Morgan Stanley: 25+

Biography

Christopher Smith leads Morgan Stanley's Trust Services Group and serves as a Senior Trust Specialist covering the Morgan Stanley offices in New England, upstate New York and Western Pennsylvania. Chris is responsible for maintaining the "Open Architecture" trustee platform, which consists of several third-party bank trust companies who can serve in a fiduciary, agency or custodial role for ultra high net worth client trust accounts. Chris and the Trust Services Group help Morgan Stanley Financial Advisors and Private Wealth Advisors, clients, prospects and the professional community understand the corporate trustee services available through Morgan Stanley and how our corporate trustee partners can be used to provide fiduciary solutions for clients. This involves reviewing trust document and statements as well as analyzing family dynamics. Chris then uses this information to recommend one or more of the firm's third-party corporate trustee partners to possibly serve as trustee, co-trustee or administrative agent for a client trust account.

Chris has over 25 years of experience in the Financial Services industry and has been with Morgan Stanley since 1993. Prior to joining Morgan Stanley (Dean Witter), Chris worked in the Retirement Plans department of Prudential Securities and prior to that the District Agency department of Prudential Insurance Company. He holds a Bachelor of Arts degree in communication/journalism and psychology from St. John Fisher College in Rochester, N.Y.

Our Team

Locations

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Disclaimer

The investments listed may not be suitable for all investors. Morgan Stanley Smith Barney LLC recommends that investors independently evaluate particular investments, and encourages investors to seek the advice of a financial advisor. The appropriateness of a particular investment will depend upon an investor's individual circumstances and objectives.

Morgan Stanley Smith Barney LLC offers a wide array of brokerage and advisory services to its clients, each of which may create a different type of relationship with different obligations to you. Please visit us at <http://www.morganstanleyindividual.com> or consult with your Financial Advisor to understand these differences.

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Morgan Stanley Smith Barney LLC does not accept appointments nor will it act as a trustee but it will provide access to trust services through an appropriate third-party corporate trustee.

2012-2023 Five Star Wealth Manager Award

Source: fivestarpromotions.com (Awarded 2021-2023) These awards were determined through an evaluation process conducted by Five Star Professional, based on objective criteria, during the following periods: 2023: 05/23/22 - 01/06/23; 2022: 5/24/21 - 11/19/21; 2021: 5/25/20 - 11/30/20; 2020: 4/1/19 - 12/13/19; 2019: 4/18/18 - 11/6/18; 2018: 3/23/17 - 11/10/17; 2017: 3/26/16 - 11/23/16; 2016: 5/18/15 - 11/6/15; 2015: 5/18/14 - 11/6/14; 2014: 5/18/13 - 11/6/13

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Disclaimer

Asset Allocation does not guarantee a profit or protect against a loss in a declining financial market.

Morgan Stanley Smith Barney LLC (“Morgan Stanley”), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

The use of the CDFA designation does not permit the rendering of legal advice by Morgan Stanley or its Financial Advisors which may only be done by a licensed attorney. The CDFA designation is not intended to imply that either Morgan Stanley or its Financial Advisors are acting as experts in this field.

Borrowing against securities may not be appropriate for everyone. You should be aware that there are risks associated with a securities based loan, including possible margin calls on short notice, and that market conditions can magnify any potential for loss.

Important Risk Information for Securities Based Lending: You need to understand that: (1) Sufficient collateral must be maintained to support your loan(s) and to take future advances; (2) You may have to deposit additional cash or eligible securities on short notice; (3) Some or all of your securities may be sold without prior notice in order to maintain account equity at required maintenance levels. You will not be entitled to choose the securities that will be sold. These actions may interrupt your long-term investment strategy and may result in adverse tax consequences or in additional fees being assessed; (4) Morgan Stanley Bank, N.A., Morgan Stanley Private Bank, National Association or Morgan Stanley Smith Barney LLC (collectively referred to as “Morgan Stanley”) reserves the right not to fund any advance request due to insufficient collateral or for any other reason except for any portion of a securities based loan that is identified as a committed facility; (5) Morgan Stanley reserves the right to increase your collateral maintenance requirements at any time without notice; and (6) Morgan Stanley reserves the right to call securities based loans at any time and for any reason.

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Disclaimer

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Source: Forbes.com (August 2023) Forbes America's Top Next-Gen Wealth Advisors & Top Next-Gen Wealth Advisors Best-In-State ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/22 - 3/31/23. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.
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