Morgan Stanley | Wealth Management

The Boston Center Group at Morgan Stanley

The Tax Calm Before The Storm?

Thursday, October 17th 4:00 pm ET on Zoom

The Boston Center Group is excited to announce the next installment of our 2024 webinar series, featuring James Bergeron, J.D. of Nuveen Investment Management. Jim will share his experience with taxation, family wealth planning, and investor education.

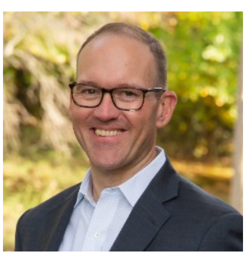
Join us for an informative webinar that will explore:

- Integration of tax and wealth planning strategies
- The shifting tax landscape and how to adjust

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

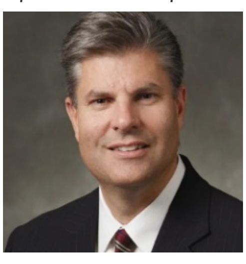
RSVP Here

Host:



Stephen Fitzmaurice CFP®, CIMA®, CLTC®, CPWA®, CRPC®
Senior Vice President, Financial Advisor,
Senior Portfolio Management Director

Speaker and Sponsor:



James Bergeron, J.D.
Managing Director, Advisor Education

As an Advisor Education specialist at Nuveen, Jim develops and delivers intellectual capital designed to help financial professionals and practices deepen client relationships and grow their businesses. He joined Nuveen in 2011 and has more than 25 years of experience in financial services and product development. His areas of expertise include taxation, family wealth planning, advisor practice management, and investor education.

Prior to joining Nuveen, Jim was general manager of Ameriprise Personal Trust Services. Previously, he served in multiple roles focused on the development of financial advisory products and services. In addition to presenting virtually and in person to audiences of all sizes, Jim is a lecturer and frequent speaker at national and international conferences, where he is often called on to demonstrate unique ways to put wealth management concepts into action.

Jim currently serves on the Northern Regional Council for the American Cancer Society. He holds a B.A. from Augsburg University and a J.D. from Vanderbilt University School of Law.

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)

Morgan Stanley Wealth Management
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