

## Family Office Resources

Solutions that Impact Multiple Generations

Family Office Resources delivers comprehensive solutions across a broad range of complex, multigenerational wealth management issues by providing ultra high net worth clients with specialized knowledge, experience, tools and networking events. The team is comprised of 60+ experienced professionals who work with your Private Wealth Advisor team to best serve you and your family.

### Overview of Capabilities

**FAMILY OFFICE RESOURCES GENERALISTS** help you and your Private Wealth Advisor curate and navigate an expansive suite of specialized resources to address the complex challenges of managing significant wealth and make complicated decisions confidently.

#### **WEALTH & ESTATE PLANNING STRATEGIES**

educate you on various tax, trust, and estate strategies, help facilitate the implementation of those strategies, and focus on the integration of those strategies with your investment plans.

#### **FAMILY GOVERNANCE**

helps you maximize the value of your family capital through the transfer and preservation of your family's shared values, and the creation of an enduring family legacy.

#### **WEALTH EDUCATION**

works alongside you and your family to develop a customized financial education curriculum based on each of your family members' goals and aspirations, existing knowledge, and learning styles.

#### **PHILANTHROPY MANAGEMENT**

supports you by offering a suite of advisory services and giving platforms, including Morgan Stanley's donor advised fund, to help define and realize your family's charitable mission.

#### **LIFESTYLE ADVISORY**

provides you with customized solutions through industry-leading, third-party providers (e.g., aircraft, cybersecurity, etc.) that help meet your exceptional needs, from the everyday to the extraordinary.

#### **TRUST SERVICES**

provides you with the access and ability to select an appropriate third-party corporate trustee through an "open architecture" trustee platform.

#### **HEALTH AND WELLNESS EDUCATION**

provides you with educational content and thought leadership, concierge support, and connectivity to healthcare and wellness centers of excellence.

#### **SINGLE FAMILY OFFICE ADVISORY**

offers you customized resources and advisory services for your existing or prospective single family office, including exclusive experiences, proprietary content, and select referral services.

**RELATED CAPABILITIES** include investment, insurance, and other risk management solutions, institutional family office services, art resources, cash management and lending products and services, and corporate equity solutions.



For additional information, or to schedule a consultation, contact your Morgan Stanley Private Wealth Advisor.

Although certain Estate Planning Strategies professionals may be admitted attorneys, these professionals holding legal degrees act purely in a non-representative capacity.

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors and 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, charitable giving, philanthropic planning and other legal matters.

Lifestyle Advisory Services: Products and services are provided by third party service providers, not Morgan Stanley Smith Barney LLC ("Morgan Stanley"). Morgan Stanley may not receive a referral fee or have any input concerning such products or services. There may be additional service providers for comparative purposes. Please perform a thorough due diligence and make your own independent decision.

The Morgan Stanley Global Impact Funding Trust, Inc. ("MS GIFT, Inc.") is an organization described in Section 501(c) (3) of the Internal Revenue Code of 1986, as amended. MS Global Impact Funding Trust ("MS GIFT") is a donor-advised fund.

Morgan Stanley Smith Barney LLC provides investment management and administrative services to MS GIFT.