

## The Compass Rose Group at Morgan Stanley

### Cardinal Directions - *Our Thoughts*

March 2025

Lots of discussion locally about banking needs. And, the increasing importance and sophistication of cybersecurity has caused many folks to seek a new commercial bank. Because of this, we have seen an increasing number of clients request to consolidate banking needs with our team to integrate cash management within their broader wealth management approach. See below an overview of Morgan Stanley's comprehensive wealth management approach, which includes sections on private banking.

[Learn More Here >](#)

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Please contact your primary Financial Advisor with The Compass Rose Group to discuss if integrating your banking and cash management needs with Morgan Stanley is a good fit.

### Scheduling Your Next Portfolio Review

The Compass Rose Group operations team is continuing to find solutions to help provide efficient and effective levels of service to clients, including scheduling biannual portfolio review meetings.

In case you have not seen it yet, we are sending out an email every six months inviting clients to schedule time with their primary advisor. When you see "Scheduling Your Next Portfolio Review" in your inbox, simply open the message and click the button "Send Meeting Request" to generate an email to our scheduling team. The email will prompt you to fill in relevant information including your name, preferred day of the week, preferred time of day, and preferred location (i.e., in-person, via Zoom, or by phone). Once you hit send, a service associate will follow-up with a few options that meet your preferences.

**You can also schedule directly by calling Craig Jones, our Registered Client Service Associate, at 505-889-2826.**

### Market Moves

Click the link below to review the recent movements and current standings of the Capital Market Indices (As of 2/28/25)

[Capital Market Indices](#)

### Personal Notes:

**Chuck:** Had a great trip to Palm Springs in February with good friends and played two rounds of golf in 70-degree weather. Great time to be there and out of the cold in Albuquerque. Ready for Daylight Savings Time so that we get more sunlight later in the day. Will miss the hour of sleep but daylight after work is a good thing. Beginning to start thinking about the vegetable garden and more warmer weather thoughts.

**Jake:** Amber and I are enjoying the warm Scottsdale weather, spending about half our time here right now. With spring training underway, we're looking forward to catching our first games of the season. Prue has been playing the piano nonstop, Bella is settling in and making great new friends at college, and Lexi recently took a wonderful vacation to Hawaii with her fiancée.

**Will:** Well, my wife and I finally decided to take the little ones to Disneyland. We had a blast! It is special to see them light up when you arrive. We are trying to travel more with them at these ages and it's been fun to see them explore it all!



**Tom:** I saw this big boy on a recent MTB ride in Phoenix. It's a perfect time of year to get out on the trails for hiking, MTB or horseback riding in the Sonoran Desert.



**Craig:** I spent the first part of this month organizing a group of volunteers to help paint a new office and production space for Three Sisters Kitchen, a non-profit organization I helped start back in 2019. Located in downtown Albuquerque, this space will incubate new food businesses with a focus on small scale manufacturing and added-value farm products. After attending a 15-week training course, farmers and entrepreneurs are offered a small start-up loan and free commercial kitchen access to get their product lines off the ground and in the market. The program has seen dozens of new businesses start over the last several years and it is always exciting to see what new ideas come through the doors of Three Sisters Kitchen!

Written By Craig Jones, Client Service Associate at The Compass Rose Group at Morgan Stanley

## The Compass Rose Group

at Morgan Stanley

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### Charles Reardon

[Connect on LinkedIn](#)

Managing Director, Wealth Advisor

[Contact Charles](#)



### Jake Tolk, CFA, CFP®, CRPC®

[Connect on LinkedIn](#)

Executive Director, Financial Advisor,  
Senior Portfolio Management Director,  
Alternative Investments Director,  
Family Wealth Director

[Contact Jake](#)



### William Reardon

[Connect on LinkedIn](#)

Senior Vice President, Financial Advisor,  
Alternative Investments Director  
Portfolio Management Director

[Contact Will](#)



### Thomas M. Batson, CFP® CIMA®

[Connect on LinkedIn](#)

Financial Advisor

[Contact Tom](#)



### Lisa Obeji, CRPC®, QPFC

[Connect on LinkedIn](#)

Senior Vice President, Financial Advisor

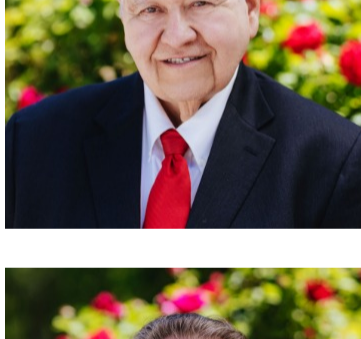
[Contact Lisa](#)



### Kenneth Montoya

First Vice President, Financial Advisor

[Contact Kenneth](#)



### Robert Hoffman

[Connect on LinkedIn](#)

Vice President, Financial Advisor

[Contact Robert](#)



### Justin Medrano, CIMA®

[Connect on LinkedIn](#)

Financial Advisor, Branch Manager

[Contact Justin](#)

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Pictured Above from Left to right: Thomas Batson (Financial Advisor), Jesse Casasa (Client Service Associate), Robert Hoffman (Financial Advisor), Fallon Peace (Portfolio Associate), Jake Tolk (Financial Advisor), Charles Reardon (Financial Advisor), Will Reardon (Financial Advisor), JoAnn Trevino (Client Service Associate), Justin Medrano (Financial Advisor), Lisa Obeji (Financial Advisor), Kenneth Montoya (Financial Advisor).

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