The Compass Rose Group

At Morgan Stanley

Five Minute Focus Video Series

Markets & Midterms

With election season quickly approaching, many clients have raised questions on possible congressional outcomes and how that may affect markets. In this brief video, CRG Financial Advisor, Will Reardon, addresses these questions by covering three areas:

- The political math behind House and Senate control.
- Macroeconomic conditions likely to influence voter sentiment.
- Historical market patterns around midterm elections.

Click Here to Watch

Planning Your RMD

(Required Minimum Distribution)

With Q4 approaching, now is a good time to start planning your Required Minimum Distribution if you haven't yet. In this video, Investment Consultant, Craig Nova, explains the rules and solutions available to you regarding your RMD.

Click Here to Watch

Of course, please contact your primary Financial Advisor with The Compass Rose Group with any questions or comments.

Cardinal Directions - Our Thoughts

October 2026

Please join us in welcoming Cameron Piese as the newest member of The Compass Rose Group, joining the team as a Registered Client Service Associate!

Originally from the East Coast, Cameron moved to Albuquerque to pursue his Economics degree at the University of New Mexico.

Prior to joining Morgan Stanley, he was with Fidelity Investments. In his two years with the firm, Cameron gained extensive experience in financial client service and is excited to hit the ground running.

Outside of work, Cameron enjoys staying physically active. He's a passionate sports fan and can be found playing basketball and hiking with his dog in his free time.

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 Sarai Ordonez, our Registered Client Service Associate, at 505 889-2027.



Personal Notes

Chuck: The ghosts and goblins came and went and we survived another Halloween. So much fun with our grandkids and a new appreciation of seeing the mystery and excitement of it all. Great costumes, great excitement, and way too much sugar for all of us. Would not want it any other way. Seeing life through the eyes of a child is a wonderful thing. Happy Halloween!



Will: Halloween was a hit, and our household is calming down after all the festivities. We will not be eating any more candy for at least a month. Fun was had and now turning attention to the holidays and closing out the year here at work. Wishing everyone a happy fall!



Mark: Mission accomplished! The Portuguese Camino from Porto to Santiago is officially in the books, and we're back home slowly settling into normal life again. Last week, I was the privilege of attending a Morgan Stanley conference, and what an incredible experience it was. It was a great opportunity to hear from the firm's senior leadership, connect with fellow advisors, learn from talented colleagues, exchange ideas, share experiences, and make some new friends along the way. I always come away from these conferences energized by the knowledge, collaboration, and sense of community within this group. I also want to give a big thank you to my Compass Rose Group teammates for all that they do and for their continued support. I'm grateful to be part of such a great team.



Fallon: We're in the final stages of our kitchen and dining room remodel, and we found a fun way to involve the kids by letting them help paint. They were thrilled to try every available color, which, much to our surprise, they didn't make nearly as big a mess as we expected! Hopefully only about a month to go, we're looking forward to having our home fully put back together and enjoying our beautiful new kitchen and floors.[1]



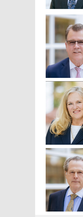
Craig: If someone is visiting Albuquerque in early October, chances are it is for one reason: Balloon Fiesta. Each the month, my childhood friend Alex visited from Houston with friends from across the country. She had not attended since we were in high school, and it was their first time. Page and I try to go most years, but as locals, it can be easy to take the event for granted. Afterall, there is always next year. Experiencing the Fiesta with first-time visitors gave us a chance to see it through fresh eyes and reminded what makes it so special. For me, some of life's most joyful moments have come from sharing a scene of wonder with others. No matter how often I attend, Balloon Fiesta has always given me that feeling.[2]



Sarai: Fall seems to have arrived somewhere between Joel's first high school football season and homecoming – Yes, getting that picture took some negotiating! I'm still not sure how I have a freshman already. The boys keep life full. My sophomore year at ASU has brought a couple of meaningful surprises of my own: an invitation to apply to Barrett, The Honors College, and a nomination to the National Society of Leadership and Success. It's a season full of milestones for all of us. Wishing you and your family a happy, memory-making fall![3]



Cameron: My name is Cameron Piese, and I'd like to formally introduce myself as the newest member of The Compass Rose Group! I've just recently transitioned into the Registered Client Service Associate role coming over from Fidelity Investments. I've recently gotten into hiking with my dog as he transitions from his "puppy" to "teenager" stages; maybe not the most ideal time of the year to get into hiking but he has been loving it! Outside of that, I had an opportunity to get some quality time with my family as a perfect way to wrap up the month. As we head into November, I look forward to meeting all of our great clients and having another productive month![4]



The Compass Rose Group at Morgan Stanley

Website

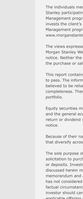
Login to your MSG Account.



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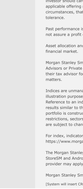
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1. Fallon Peace, Assistant Vice President, Group Director
2. Craig Nova, Investment Consultant
3. Sarai Ordonez, Registered Client Service Associate
4. Cameron Piese, Registered Client Service Associate

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