



The Compass Rose Group at Morgan Stanley

Cardinal Directions - Our Thoughts

July 2024

It is with bittersweet excitement that we congratulate our dear colleague and friend, Juanita Danzeiser, on her retirement from The Compass Rose Group and Morgan Stanley on July 1st. After over 44 years of service at the firm, Juanita and her husband, John, will be moving to Northern California to tackle their newest role: being grandparents.

Nothing written can begin to show our appreciation for all Juanita has done to help clients achieve their goals and make our team great. Juanita has been pivotal to the growth of the team as a member of the Executive Committee since its inception in 2022, exemplifying servant leadership by always putting clients and teammates needs first. She has been the heart and soul of the team, and she will be very missed.

Please join The Compass Rose Group in congratulating Juanita!

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 06/28/24)

[Capital Market Indices](#)

Personal Notes:

Juanita:

To all clients and partners of The Compass Rose Group: Thank you for your unwavering trust and loyalty over the years, it has been an incredible journey, and I am truly grateful to have had the opportunity to work with you. I would like to thank you very much for your support and the successful relationship. My retirement date is Friday, June 28th.

Chuck: Heading out to San Jose as I write this for grandbaby Ryan's first birthday. Started out at 3 pounds and now over 20. What a miracle. Two more grandbaby birthdays in July. Rosalee turns 1 and Hayes turns 3. I feel very blessed. Have a golf trip planned for July to Bandon Dunes up in Oregon. The closest thing we have in this country to playing golf in Scotland. A wonderful paradise for golfers. Can get any type of weather up there but that is part of the lure of coastal golf. Six golf courses and not much else but golf, food, and drink. Can't wait.

Jake: June is a month of birthday celebrations for us with Prue's on the 23rd and Amber's on the 25th. Prue hit double digits this year which has been exciting for her, and Amber is forever young. We have been enjoying the outdoor kitchen that we built a few years ago, the summer swimming days, and more progress on the yard and garden.

Will: Our grass is in full swing for the summer! It's been fun to work on it and see it grow. The kids love to run around and get a little lost. It's been a busy summer so far, with both toddlers enrolled in tennis, soccer, and swimming. Clara also started ballet and is really enjoying it. No complaints here, just enjoying it all.



Fallon: We have already enjoyed several camping trips this season. Our last trip, for Father's Day weekend, we were able to spend some time hiking and climbing the rocks near our campsite. Hopefully we are able to get several more trips in this summer before school starts.



The Compass Rose Group at Morgan Stanley

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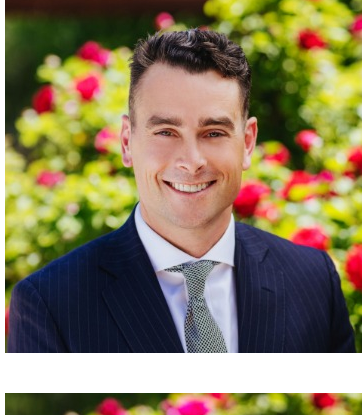
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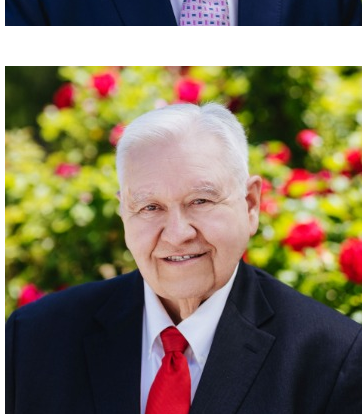
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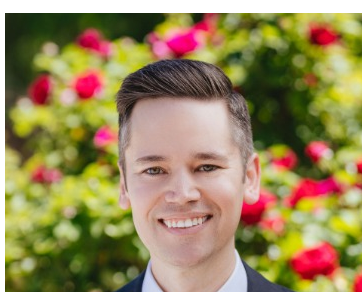
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Pictured Above from Left to right: Thomas Batson (Financial Advisor), Jesse Casasa (Client Service Associate), Robert Hoffman (Financial Advisor), Fallon Peace (Portfolio Associate), Jake Tolk (Financial Advisor), Charles Reardon (Financial Advisor), 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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For index, indicator and survey definitions referenced in this report please visit the following: <https://www.morganstanley.com/wealth-investmentsolutions/wmir-definitions>.

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