

The Conscious Wealth Management Group at Morgan Stanley

Summer 2025 Insights

What's in a Name

Have you ever wondered why we chose the name The Conscious Wealth Management Group?

Merriam-Webster defines conscious as: *perceiving, apprehending, or noticing with a degree of controlled thought or observation — implying focused attention.* ([Source](#)) The American Heritage Dictionary expands on this: *a sense of one's personal or collective identity, including the attitudes, beliefs, and sensitivity considered characteristic of an individual.* ([Source](#))

In an age when financial information floods your mailbox, your TV, and social media, our intention is to provide clients with a personalized, attentive, and thoughtful — *conscious* — approach to financial advice and wealth management.

For us, this approach reflects the Hawaiian value of Mālama, which means to help care for, protect, and preserve. Mālama reminds us that true stewardship involves not just making wise financial decisions, but also considering how those decisions can potentially impact your family, your community, and future generations. It calls us to act with intention and compassion, values we strive to embody in every client relationship.

How does this look in practice?

We have clients whose core values center around caring for loved ones. This can mean planning for funding education or creating a sense of financial confidence for their families. We help design plans aimed to reflect these deeply personal priorities, recognizing that financial decisions are often intertwined with family hopes and responsibilities.

Others come to us wanting to use their investments as a tool for positive change. Our team has the experience, passion and access to the firm's vast resources to craft investment portfolios that emphasize investment strategies designed to help address their preferred environmental, economic and social goals — while striving for competitive performance. For a growing portion of our clients, focusing on social impact outcomes may outweigh financial results.

For many of our clients, conscious wealth management also includes charitable giving. Whether that's making direct donations, establishing a donor-advised fund, or building a legacy of

philanthropy. We assist clients in incorporating giving into their overall financial plan in a thoughtful, tax-efficient way.

In every case, we strive to honor the spirit of Mālama by helping clients steward their resources with care, balancing today's needs with tomorrow's possibilities and empowering them to act with clarity and confidence.

We are grateful for the confidence you place in us and look forward to continuing to support you on your financial journey.

As always, we are just a call, text, or email away.

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