

Previous HER Way Events Calendar

November 2017 through October 2024

2024 HER Way Events	Event Title	Description
10/8/2024	HER Day 2024	HER Way, founded in 2017, is dedicated to helping women engage with one another around money matters, striving to accelerate successful outcomes in achieving personal and financial goals. Morgan Stanley's HER Day will feature HER Talks and discussions with luminaries and thought leaders for a market update and across five key disciplines: Health & Wellness, Personal Finance, Personal and Professional Development, Entrepreneurship and Philanthropy. Please join us, and our special guests, to share insights on important topics, financial trends and be part of the conversation.
9/10/2024	Empowering Women Financial Advisors	Our special guest, Julie Biel, Senior Research Analyst at Kayne Anderson Rudnick Investment Management, will also be available to share her insights on the financial landscape.
5/8/2024	Women in Media- Elevating Women's Views and Voices	Women's impactful presence in media elevates women's views, voices, and consumers preferences. Discover how these industry influencers are reshaping societal perceptions and inspiring women in their personal and financial decision-making, leveraging their experiences and platforms in film, radio, and TV.

<p>3/13/2024</p>	<p>Beyond the Check-Up: Understanding the Drivers of Physical and Financial Wellness</p>	<p>Join us as we celebrate International Women’s Month by focusing on women’s physical and financial health. Women’s health and financial needs change over time – what works in our 20s may not work in our 50s and beyond. Join us to learn how to successfully navigate the decades with physical and financial strength at any age. Learn more about the latest trends and how to separate the facts from the fads.</p>
<p>1/17/2024</p>	<p>Economic & Market Outlook for 2024</p>	<p>Experience an exclusive preview of the future at our 2024 Economic and Market Outlook event. Join our distinguished speakers, Gabriela Santos, Managing Director, Chief Market Strategist for the Americas on the Global Markets Insights Strategy Team at JP Morgan Asset Management, and Sarah Wolfe, Vice President of US Economics at Morgan Stanley’s Research Team, as they decode the trends shaping markets and offer key insights to navigate the evolving economic landscape.</p>
<p>2023 HER Way Events</p>	<p>Event Title</p>	<p>Description</p>
<p>12/13/2023</p>	<p>Andrew Moore: Whiskey Point and Other Tales Yancey Richardson Gallery</p>	<p>We are thrilled to invite our special clients who appreciate art to an upcoming exhibition in December. We will be showcasing the remarkable work of Andrew Moore at Yancey Richardson gallery. Moore’s photography delves into the intersections of history and place, capturing vibrant moments in architectural structures and landscapes around the world. The exhibition, Whiskey Point and Other Tales, delves into the dazzling scenes and moody vistas of the storied Hudson Valley of New York.</p>

<p>11/8/2023</p>	<p>Building a Timeless Wardrobe and Diversified Portfolio</p>	<p>Experience an exhilarating fireside chat on crafting a timeless wardrobe and achieving financial wellness! Be part of the excitement as our guest speaker, Gayle Perry shares invaluable insights. Rally your friends, bring your burning questions, and get ready for a captivating Q&A session. Indulge in delectable lite bites and wine, adding a touch of luxury to this unforgettable event. Don't miss your chance – join us for an evening of inspiration and empowerment.</p>
<p>7/19/2023</p>	<p>Uncorking the Secrets of Wealth Management: A “Tasting” Journey Through Wealth Management</p>	<p>Join us for a wine and wealth management event like no other! Discover the secrets to success in both worlds with our expert financial and wine professionals. From the elements of great wine to the wealth management elements of financial success, this event will have it all. You'll have the opportunity to learn from some of the best in the business, all while enjoying a relaxed and enjoyable atmosphere. Don't miss out on this unique opportunity to blend the worlds of wine and wealth management!</p>
<p>5/24/2023</p>	<p>Inflation, Recession, Bank Failures, and the Debt Ceiling- Perspectives on the Economic and Political Landscape for 2023</p>	<p>Now that Covid is no longer monopolizing headlines, there are so many other topics weighing on our minds. Learn how investors are rethinking portfolio construction. Please join us as PIMCO's head of Public Policy, Libby Cantrill, and Morgan Stanley's own Chief Investment Officer, Lisa Shalett, share their views on today's most pressing economic and political headwinds.</p>
<p>2/15/2023</p>	<p>The Power of Activist Philanthropy in the face of the Climate Emergency</p>	<p>Please join the HER Way Committee and guest speaker Sally Ranney, President/Co-Founder of Global Choices (GC), for a discussion on The Power of Activist Philanthropy in the face of the Climate Emergency</p>

2022 HER Way Events	Event Title	Description
9/29/2022	HER Way presents Joseph M. Terranova: Mind over Markets	The HER Way committee at Morgan Stanley has planned an evening of fun to educate you on a variety of important financial topics with our guest speaker Joseph M. Terranova who will address setting the right goals to achieve financial success.
3/15/2022	Investing in Women - The Ripple Effect Impacting Our Homes, Health, & Communities	Join us as we reflect on International Women’s Day 2022, by showcasing investment efforts in women that are positively impacting lives across the globe.
2/2/2022	2022 New Year, New Challenges, New Opportunities	2021 was a stellar year of upside for investors despite dealing with the global pandemic, geopolitical risks, hyper-inflation, and concerns about the Fed-tightening to name a few. Some of the challenges of 2021 are still looming into the New Year. So, what should investors be doing? Hear from two of the brightest minds on Wall Street as we walk you through the markets outlook, the risks, and some strategic ideas to help protect your investment assets and nest egg. This would be a great conversation to be a part of especially for those that look for income from their investment portfolios.

2021 HER Way Events	Event Title	Description
10/20/2021	Women, Wellness and Wealth	<p>As a gender, women continue to build, influence and control wealth on a global level, whether as heads of households, in corporations, as business owners, couples, estate executors, widows, divorcees, mothers, heirs and more. This growing responsibility means it's more important than ever for her to understand and analyze the role wealth plays in achieving wellness for herself and those most important to her. This presentation gives your female clients, their networks and prospects the tools to empower them to participate in defining and reaching the goals they hold for their financial future—and why a financial advisor is the essential partner in that journey.</p>
9/14/2021	Planning to Grow Old Gracefully	<p>For many, growing old gracefully is easier said than done. As we age, maintaining a high quality of life can feel more challenging, as we may need to rely on others for assistance and even medical care. Designing an aging plan, well before a crisis presents, allows a person the security of knowing that their own standards of care can be met and financed properly.</p>
7/22/2021	Art As A Passion and An Asset	<p>Art has been a means to influence, express and impress for centuries. Develop your knowledge about art and the art world AND create your own work of art with HER Way! Learn what is considered art, how to care for art and why museums are changing and updating their collections... AND relax, be inspired and paint while you learn.</p>

<p>4/29/2021</p>	<p>Cocktails & Change (Ashley Dour)</p>	<p>Adapting to change doesn't always come naturally, but you can learn valuable techniques to help you build authentic behaviors to help you manage your success. In this program you will identify obstacles and create genuine strategies to influence effective professional and personal change.</p>
<p>3/11/2021</p>	<p>Resilience and Leadership Girls and Women Leading the Way</p>	<p>Want to know the number one way to improve a girl's odds in the world? Education. Girl Rising is a global campaign that uses the power of storytelling to share this simple truth and transform societies. Christina & Judith will speak to the resilience of women as they lead their communities during the crisis and why investing in girls creates the leaders for future crises and a better world.</p>
<p>1/28/2021</p>	<p>Insight to the 2021 Outlook for the US</p>	<p>Ellen Zentner, explains how life after Covid may look a bit different, and consumers will still value “experiences” over “things.” Hear about things Ellen expects will help propel the economy in 2021.</p>

2020 HER Way Events	Event Title	Description
5/26/2020	<p>The Coronavirus Aid, Relief, and Economic Security (CARES) Act: What You Need to Know Now for You, Your Friends and Your Family</p>	<p>The Coronavirus Aid, Relief, and Economic Security (CARES) Act What You Need to Know Now for You, Your Friends and Your Family.</p>
6/23/2020	<p>A New Era Emerges: The Age of Connected Intelligence & Its Impact on Our Lives and Wealth</p>	<p>We are living in one of the most innovative and disruptive times in our history, and the pace of innovation is accelerating. While markets can change instantaneously, technological revolutions occur over longer periods and create more permanent change. Disruption is occurring across every sector of economy, and we believe we are in the beginning of the next Technical Revolution ... one we call “The Age of Connected Intelligence”.</p>
7/7/2020	<p>Delaware - Everyday Apps for Extraordinary Times</p>	<p>Everyday Apps for Extraordinary Times Leveraging technology to navigate our new normal. COVID-19 lockdowns around the world have challenged us in finding ways to best manage our time. Stuck at home, with limited activities and restricted from places to go, leave many wondering how to stay connected while being more efficient. We will discuss Everyday Apps for Extraordinary Times to help best navigate our days. These fun and easy apps appeal to all ages and health and can help to connect all generations.</p>

<p>7/21/2020</p>	<p>Washington Outlook 2020 (Jessica Marshall)</p>	<p>With the US Election fast approaching, we'll take a deep dive into economic and social drivers that can potentially impact election results. How will a Covid -19 and social media driven world influence voter sentiment, campaign messaging and future policy making? What key states should we watch, as presidential candidates attempt to obtain highly sought after electoral college votes? How will election outcomes reflect political party distribution and the balance of powers in the House and Senate? Join us as this highly regarded Head of Public Policy shares HER wisdom and perspective.</p>
<p>8/4/2020</p>	<p>Energy for Performance</p>	<p>A discussion that will cover the extensive research done by the Johnson & Johnson Human Performance Institute® (HPI) to understand what makes elite athletes reach peak performance. On this call, she will translate this wisdom into actionable tools you can use to achieve greater success — in work and in life.</p>
<p>8/18/2020</p>	<p>Image with Style and Grace (Anne Izzillo)</p>	<p>Working from home & showing up online will continue to be the norm even after businesses and offices open back up. In this interactive, inspiring, and informative webinar, Tania Sterl will explore ways to transition your wardrobe from work from home back to the workplace and ensure that your image continues to represent a strong personal brand with style.</p>
<p>9/10/2020</p>	<p>Investing in Positive Change: Investing in a More Resilient Future</p>	<p>Create positive social and environmental impact using a variety of investment products seeking to generate market rate returns. Lily has dedicated her career to helping clients integrate socially and environmentally responsible investing into their portfolios, striving for a more resilient and positive future while meeting their financial goals!</p>

<p>10/20/2020</p>	<p>Cyber Security in a COVID World</p>	<p>The Coronavirus pandemic has ushered in what some experts are calling a “cybercrime pandemic.” Fraudsters are increasingly taking advantage of these uncertain and unprecedented times to launch COVID-themed scams and entice potential victims. Rachel will brief attendees on the current cyber risk landscape and offer practical tips and suggestions for how individuals can protect themselves.</p>
<p>11/10/2020</p>	<p>Ethical Wills (Sharon Cunningham)</p>	<p>Can you identify the beliefs, values and experiences that have shaped your life and driven your success? Do you want to convey your most important life lessons with the ones you hold dear, in addition to effectively transferring your wealth? Jan Blakeley Holman and Ann Margaret Carrozza will lead the discussion on how ethical wills and proper estate planning can help you purposefully pass along the legacy you envision.</p>
<p>12/15/2020</p>	<p>Once Upon a Meatball (Anne Izzillo)</p>	<p>The Women of HER Way invites you to a fun evening with Anna Francese Gass, chef and author of Heirloom Kitchen: Heritage Recipes and Family Stories from the Tables of Immigrant Women. Anna will guide us through a recipe demonstration of her friend - Lisetta Farris’s Chocolate-Hazelnut Spread while regaling us with the origin of her cookbook. This cookbook contains riveting stories and time-honored family recipes derived from a culturally diverse group of immigrant women. According to Anna, “We could all afford to discover our American heritage at the bottom of a mixing bowl.”</p>

2019 HER Way Events	Event Title	Description
1/29/2019	Women's Brain Health	<p>Addressing the gaps in Alzheimer’s disease awareness, prevention, & treatment. Alzheimer’s disease is one of the twenty-first century’s greatest health, social, and economic challenges. Women are disproportionately impacted, both as patients and as caregivers. To address this issue, we’ve assembled a panel of top Alzheimer researchers, advocates, and planning specialists to discuss risk factors, symptoms, and preventive practices for women of all ages and explore ways that women can support themselves, their families, and the patient after an Alzheimer’s diagnosis – personally and financially</p>
1/15/2019	Financially Smart	<p>Engaging breakfast discussion on the importance of financial literacy. Speakers provided information about the common financial challenges encountered by women at various stages of life, and tips for how to address them.</p>
4/2/2019	Women and Money: Deep Dive Discussions	<p>At this interactive event, attendees rotated through round-table discussions led by experts on the following topics:</p> <ol style="list-style-type: none"> 1. Good Debt v. Bad Debt 2. Saving for College 3. Social security and Medicare Planning 4. Investing 101 – Back to the Basics 5. Budgeting and Cash Flow Planning 6. Saving for Retirement 7. Estate Planning 101 8. Plan for the unexpected- Insurance Basics 9. How do you pay for life after your paycheck ends? 10. Alternatives 101 – What you should know about them?

<p>6/11/2019</p>	<p>A Healthier, Wealthier You!</p>	<p>Presentation from Amy Zhang, CFA on different ways to invest in emerging healthcare opportunities followed by presentations from healthcare experts on how to effectively manage stress, and to become more physically fit. Attendees learned how to have more years in retirement & how to financially be able to enjoy them!</p>
<p>7/16/2019</p>	<p>Women, Wealth & Wine: Investing in Women & Women in Wine Tasting</p>	<p>Presentation from Jenifer Cannon of Impax Asset Management on the benefits of investing in companies that embrace gender diversity followed by a guided wine tasting of select wines created by women winemakers who are changing the face of the wine industry.</p>
<p>9/17/2018</p>	<p>The Spirit of Philanthropy: How to Give It Away</p>	<p>Donor Advised Funds, Private Foundations, Checkbook Philanthropy – what’s it all mean? What are the tax benefits? This event highlighted simple and practical techniques that can make giving it away a financial win for both you and your favorite charity.</p>
<p>11/14/2019</p>	<p>Networking at Any Age</p>	<p>Discussion of ways to network in both your personal and professional lives. Opportunity to meet new people, expanding your connections and finding new passions.</p>

2018 HER Way Events	Event Title	Description
1/25/2018	The Impact of 2017 Tax Legislation for Individuals and Small Businesses	Panel discussion featuring Morgan Stanley Research strategists Meredith M. Pickett and Mark Schmidt, CFA, on the impact of 2017 Tax Legislation for individuals and small businesses.
2/14/2018	HER Way with Dr. Melissa Donohue: <i>Money & Relationships</i>	HER Way Committee members Sharon Cunningham & Christina Paul hosted a fireside chat in our NYC office with Dr. Melissa Donahue, Vice President & Senior Wealth Education Specialist at Morgan Stanley on the topic of Money and Relationships.
4/11/2018	An Evening at Gibney Dance: Women's Empowerment through Passion and Purpose	Live performance from the Gibney dancers, Fireside chat and Q&A with entrepreneur and philanthropist Gina Gibney.
5/15/2018	China - Navigating a Complex Relationship	Engaging conversation with one of China's top economists, Dr. Liang Hong (CIO of CICC Bank) and Lisa Shalett, Morgan Stanley's Head of Wealth Management Investment Resources. Dr. Liang candidly shared her thoughts and perspective on the Chinese economy, and the investment opportunities that may well be ahead.

<p>7/10/2018</p>	<p>Pinot with a Purpose</p>	<p>Mary Jane McQuillen, Head of the Environmental, Social and Governance Investment Program at ClearBridge Investments, lead an engaging conversation about what sustainability means for the wine industry, and for your investment portfolio. This discussion was followed by a wine tasting led by a premier female sommelier.</p>
<p>10/3/2018</p>	<p>Forever Young</p>	<p>Panel discussion with experts in Functional Medicine, Women’s Health, and Cosmetic Dermatology featuring: * Dr. Susan Blum, Expert in Functional Medicine * Dayna Kurtz, LMSW, CPT, Expert in Optimizing Women’s</p>
<p>11/27/2018</p>	<p>Tis the Season for Tech</p>	<p>Dr. Meghan O’Brien, Specialist in Cosmetic Dermatology Presentation from nationwide about planning for retirement and social security. Presentation led by McQuarrie on the different technology tools that can help you manage priorities such as personal productivity, security, parenting, and health/wellness, allowing you to effectively accomplish more each day.</p>
<p>2017 HER Way Events</p>	<p>Event Title</p>	<p>Description</p>
<p>11/14/2017</p>	<p>Her Day 2017</p>	<p>An interactive and immersive full day event designed to help attendees sharpen their life's narrative, and contribute to their success and well-being. The day featured various engaging "HER Talks" curated around the topics and themes of health and wellness, personal and professional development, personal finance, entrepreneurship, and philanthropy. Featured speakers for the event include Gloria Steinem, Bobbi Brown and Shelley O'Connor.</p>

The guest speaker is neither an employee nor affiliated with Morgan Stanley Wealth Management. Opinions expressed by the guest speaker are solely their own and do not necessarily reflect those of Morgan Stanley. All opinions are subject to change without notice. Neither the information provided nor any opinion expressed constitutes a solicitation for the purchase or sale of any security. Past performance is no guarantee of future results. Individuals should consult with their tax/legal advisors before making any tax/legal-related investment decisions as Morgan Stanley and its Financial Advisors do not provide tax/legal advice.

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