Morgan Stanley

The Des Moines Group
at Morgan Stanley

Pictured left to right: Christy Wetrich Wealth Management Associate *Financial Planning Specialist, James Baker Financial Advisor, Raegan Wagner Financial Advisor, Matthew Jens Financial Advisor, John Victor, CFP® Financial Advisor, Stacey Burger Client Service Associate, Tom Hunt, CFP® Financial Advisor, Zach Bouslog, QPFC Financial Advisor, Priscilla Sayeed CDFA® Financial Advisor, Lisette Villalba Torres Client Service Associate.

With spring in the air, it's the perfect time for a little financial spring cleaning. As the season of renewal begins, we encourage you to refresh your financial goals, review your budget, and clear out any old financial habits.

As always,
If you have any questions don't hesitate to reach out!

Featured Updates, Insights & Resources

1Q25 DMG Quarterly Update Call - Markets in 5 Minutes

Date: **March, 28th, 2025**
Time: **9:00am CST**

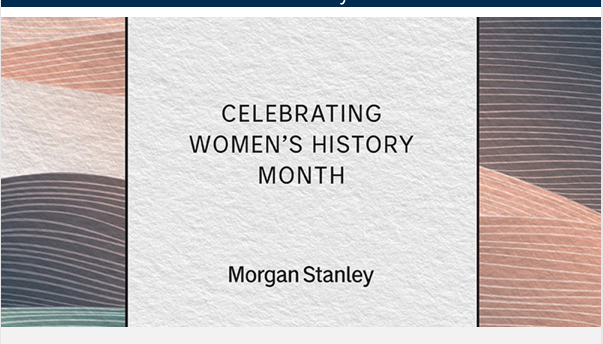
Toll Free: ***+1 (877) 777 - 8895***
Participant Code: ***2066423***

Approved submission ID#4150978

Quarterly Market Essentials

Click here to learn more

Women's History Month



This Women's History Month, we celebrate and honor the accomplishments of inspirational women around the globe.

Spring Clean Your Finances

A lot can pile up over a year, or even a month. Check out some tips to help you clear the clutter and get your finances in order this spring.

Read More

Create a Budget

Creating a budget can feel overwhelming, but it doesn't have to be. This article breaks down the steps to help you take control of your finances and set a clear path for managing your money.

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6 Money Questions Your Tax Return Can Answer

Examining your tax return may reveal opportunities to save money hidden between its lines. You may be surprised by what you find.

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February Happenings: What Have We Been Up To?

Matt enjoyed an early 'Spring Break' with his family in Winter Park, Colorado. They had sunshine and then 12" of powder.

Matt's kids posed for a photo while dad was still trying to navigate the mountain in the background. The kids are officially better skiers than Mom & Dad.

Matt travelled to Huntington Beach, California with his wife, Kelli. This was a Morgan Stanley meeting focused on upcoming enhancements to technology for our Advisory Programs. Kelli enjoyed walking on the boardwalk and reading her book on the beach while Matt was in meetings.

The Bouslogs celebrated Berkley's 6th birthday! Time flies when you're having fun.

Zach enjoyed a civic-centric day with his Leadership Urbandale class of 2025. They were granted access to the very peak of the State Capitol Building.

Raegan's daughter, Reese, turned 16 at the end of February and celebrated with cake and an official driver's license!

She also had fun getting all dressed up with her friends for the North Polk winter formal dance!

Raegan's son, Nathan, finished up middle school basketball season at North Polk. Nathan and his team had a great season, and now they are looking forward to track season!

Priscilla enjoyed a visit from daughter Ella.

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The sour dough starter provided a lesson from daughter to mother in bread baking.

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