

# Morgan Stanley



## The DESIGN Group at Morgan Stanley

The DESIGN Group at Morgan Stanley

3280 Peachtree Rd NE | Suite 1900 | Atlanta, GA 30305

Direct: (404) 266-5922

[The DESIGN Group | Atlanta, GA | Morgan Stanley Wealth Management](#)

Will your legacy be by default or by design?



# Roadmap for Engagement

Pick your topic of focus. Work with your team of advisors on execution. We've included the tools and steps to get started.

## Estate Planning:

- a. [Grantor's Triangle](#)
- b. List your assets and liabilities. Keep it simple.
- c. Balance sheet without your balances
- d. Estate Planning Checklist
- e. Estate Planning Flow Chart

## Values Exercise:

- a. [Identify your values](#)
- b. Have spouse identify values.
- c. Schedule time to hear each other's answers.
- d. Identify your common values.

## Your Story:

- a. [Framework for telling your story](#)
- b. Identify your heroes.
- c. Wisdom behind the wealth.
- d. Draft a letter to your children.

## Creating a two-way conversation with your rising generation:

- a. Define the roles and responsibilities of those involved in the Grantor's Triangle.
- b. Schedule a meeting with all key players of Grantor's Triangle.
- c. Review Balance sheet without your balances.
- d. Philanthropy as a family: Guidebook "Philanthropy and Legacy: Making your Mark."
- e. [Family Mission Statement](#): A collection of values and thoughts from your family
- f. Agendas for family meetings

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Individuals should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trusts, estate planning, charitable giving, philanthropic planning or other legal matters.

Morgan Stanley Smith Barney LLC offers a wide array of brokerage and advisory services to its clients, each of which may create a different type of relationship with different obligations to you. Please visit us at <http://www.morganstanleyindividual.com> or consult with your Financial Advisor to understand these differences.

Morgan Stanley Smith Barney LLC. Member SIPC.  
CRC4053966 11/2024