Morgan Stanley

PRIVATE WEALTH MANAGEMENT

The Fortis Group at Morgan Stanley Private Wealth Management

We are a highly experienced team of investing and wealth planning professionals who serve a select global clientele of highly affluent families and individuals. Operating as a boutique practice within a global financial leader, we deliver an exceptional level of personal service and craft strategies that are tailored to each of our clients' specific goals. We offer sophisticated solutions to complex wealth structuring, investing and transfer challenges, and provide guidance on key family dynamics issues that can be the foundation of an enduring legacy. We seek to build trusting relationships that last for decades so we can support your family for generations to come.

From left: Grant W. Templin, William S. Platt, Renato J. Reali

The Fortis Group at Morgan Stanley
Private Wealth Management
55 East 52nd Street, 30th Floor
New York, NY 10055
212-883-8180 / MAIN

The Clients We Serve

Many of our relationships begin at moments of meaningful change in our clients' lives, typically involving a significant increase in personal wealth and a corresponding increase in the complexity of managing it. If you have reached such an inflection point in your life, we have the experienced perspective and extensive resources to help you address the challenges you will face and take advantage of the opportunities that will arise.

ENTREPRENEURS AND BUSINESS OWNERS
across a broad range of industries and all stages of development, from early-stage expansion to pre-liquidity and succession planning. Our experience enables us to offer advice that straddles the border between your personal and professional financial life, helping you take advantage of the opportunities available to you.

ATHLETES AND ENTERTAINERS
who have achieved financial success in some of the world's most competitive arenas. We craft comprehensive wealth management plans in an effort to simplify the administration of their financial lives so they can focus on their artistic pursuits.

ULTRA-HIGH NET WORTH FAMILIES AND FAMILY OFFICES
who require investment and wealth planning services to help preserve and enhance multigenerational wealth and, often, consultative experience and knowledge to develop and maintain durable family governance structures and procedures.

Thanks to the trust our clients have placed in us, we were named as a **2024 Forbes Best-In-State Wealth Management Team.**

Source: Forbes (Awarded January 2024). Data compiled by Forbes based on time period from 03/31/2022–03/31/2023. Please refer to important criteria and methodology at the end of this material.

Meet The Fortis Group

ADVISORS

Renato J. Reali
Managing Director
Private Wealth Advisor

40+ years of wealth management experience

Senior Portfolio Manager

Global Sports and Entertainment Director

Alternative Investments Director

B.A., St. John's University

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William S. Platt
Managing Director
Private Wealth Advisor

30+ years of wealth management experience

International Client Advisor

Global Sports and Entertainment Director

Alternative Investments Director

B.A., Washington & Jefferson College

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Grant W. Templin, CFP®
First Vice President
Private Wealth Advisor

10+ years of wealth management experience

CERTIFIED FINANCIAL PLANNER™ (CFP®)

Global Sports and Entertainment Director

Family Wealth Director

B.A., Washington & Jefferson College

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SUPPORT TEAM

Erika Imbriano
Vice President

20+ years of experience

B.S., St. Francis College

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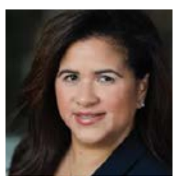

Ivette Marrero-Wagner
Portfolio Associate

30+ years of experience

Client Service Associate Coach

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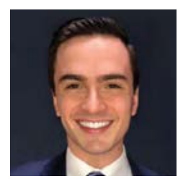

Smith Brickner
Registered Associate

3 years of experience

B.A., Mercy College

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Source: Forbes.com (Jan 2024) 2024 Forbes Best-In-State Wealth Management Teams ranking awarded in 2024. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period from 3/31/22–3/31/23. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC, for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each Financial Advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

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