

The Hatch Doshi Group at Morgan Stanley

We bring more than 100 years of collective experience to a select group of clientele. Our clients rely on our diverse backgrounds and proficiencies to help them with everything related to their finances. Every client has a unique set of goals and values. We help our clients define these and build a personalized financial plan. Our mission is to help simplify our clients' lives by managing their investments, collaborating with their other trusted advisors, helping with executive services, assisting with family governance, facilitating multigenerational wealth transfer and supporting their philanthropic endeavors. We have taken a pledge to always put our clients' interests first and pride ourselves on being fully transparent. We seek to strengthen each family's financial standing and strive every day to add value to those whom we're privileged to call our clients.



THE HATCH DOSHI GROUP AT MORGAN STANLEY

2141 Rosecrans Avenue
Suite 3100
El Segundo, CA 90245

1999 Avenue of the Stars
Suite 2400
Los Angeles, CA 90067

310-297-3771 / phone
866-398-5548 / toll-free
310-359-8070 / fax

www.advisor.morganstanley.com/the-hatch-doshi-group



Michael Hatch, CFP®, CPWA®, CIMA®

Executive Director, Private Wealth Advisor

Michael began his career on the institutional side as an Assistant Vice President at TCW Investment Management Company. Becoming a Financial Advisor since 2003, Michael directs financial planning for the group, creating strategies for clients to address complex financial issues and helping them pursue their goals. Michael also assists in investment manager research/selection, portfolio construction and asset allocation. Clients depend on his personal experience, extensive credentials and integrity to help them preserve their wealth for themselves and their families. He has experience in estate planning and wealth transfer strategies and philanthropic planning. Residing in Manhattan Beach with his wife, Audra, and daughters, Charlee and Alex, Mike enjoys being active within his community. Michael currently sits on the advisory board of the Manhattan Beach Country Club and serves on the boards of the Los Angeles Sports Council and its foundation, as well as the Southern California Committee for the Olympic Games. As an Eagle Scout, he enjoys the outdoors, particularly hunting and fishing.

PREVIOUS EXPERIENCE

- UBS Financial Services, Inc.
- TCW Investment Management

AWARDS AND DESIGNATIONS

- Forbes Best-In-State Wealth Advisors, CA, 2019, 2020, 2023
- Certified Financial Planner™ (CFP®) professional
- Certified Investment Management Analyst® (CIMA®)
- Certified Private Wealth Associate (CPWA®)

FINRA LICENSES

- Series 7, 63 and 65 securities licenses; insurance license, NMLS# 2050330

EDUCATION

- B.S., economics and organizational communications, University of Utah

2019, 2020, 2023 Forbes Best-In-State Wealth Advisors

Source: Forbes.com (Awarded 2019, 2020, 2023). Data compiled by SHOOK Research LLC based on the 12-month period concluding in June of the year prior to the issuance of the award. Please see page 4 for important disclaimers



Harshal Doshi , CPWA®

Executive Director, Private Wealth Advisor

Born in India and raised in Los Angeles, Harshal became financially independent at 17 and put himself through college. This unique perspective, coupled with a deep understanding of the economy and capital markets, makes Harshal an excellent resource to help clients with financial decision-making. Becoming a Financial Advisor in 2003, Harshal facilitates trading and stock selection, along with top-down and bottom-up level research for clients. He focuses on taxable and tax-free fixed income, and is in charge of individual security analysis, as well as overall asset allocation for our team. An avid reader, Harshal enjoys traveling and spending quality time with his daughter, Jaya. He actively supports a number of charitable groups that are dedicated to improving the lives of children with special needs.

PREVIOUS EXPERIENCE

- UBS Financial Services, Inc.

AWARDS AND DESIGNATIONS

- Forbes Best-In-State Wealth Advisors, CA, 2019, 2020, 2023
- Forbes America's Top Next-Generation Wealth Advisors, 2018
- Certified Private Wealth Associate (CPWA®)

FINRA LICENSES

- Series 7 and 66 securities licenses; insurance license, NMLS# 2050124

EDUCATION

- B.S., economics and international development studies, with a minor in political



Kimberly Myers, CFP®
Wealth Management Associate

Kimberly started in the business in 2003. Prior to joining the team, she worked as an Investment Analyst in the Downtown Los Angeles office of UBS. Kim is a Certified Financial Planner™ professional and holds her Series 7 and 66 securities licenses. Her passion for helping others, along with her hunger to constantly learn, helps her to oversee our financial planning process. Kim helps our executive clients with their deferred compensation, Rule 144 restricted transactions, banking and lending services, and Medicare and Social Security strategies. Kimberly graduated from the University of Miami with a B.S. in international finance and marketing and a B.S. in business management. In her free time, she enjoys running, hiking and traveling to adventurous places around the world. She also coaches for the Westside Special Olympics.

PREVIOUS EXPERIENCE

- UBS Financial Services, Inc.

DESIGNATIONS

- Certified Financial Planner™ (CFP®) Professional

FINRA LICENSES

- Series 7 and 66 securities licenses

EDUCATION

- B.S., international finance and marketing; B.S., business management, University of Miami



Michael Ashburn
Business Development Specialist

Michael started in the industry in 2006 and obtained his Series 7 and 66 securities licenses shortly thereafter. His dependability, tremendous work ethic, diligence and meticulous attention to detail make him naturally suited for our team. He manages the daily operations of the team, which, along with our clients, relies on him for execution. Michael focuses on corporate and executive services, such as Rule 144 restricted stock/options, complex credit strategies and insurance/long-term care solutions. Michael has an MBA from the University of Detroit Mercy, a B.A. in management and psychology from the University of Michigan-Dearborn, as well as a degree in culinary arts from Schoolcraft College. Michael lives in Playa Vista with his wife, Julia, and son, James, they are both very active in their church.

PREVIOUS EXPERIENCE

- UBS Financial Services, Inc.

FINRA LICENSES

- Series 7 and 66 securities licenses

EDUCATION

- M.B.A., University of Detroit Mercy
B.A., management and psychology, University of Michigan, Dearborn



Alexandria Settle
PWA Registered Client Service Associate

Alexandria started in the industry in 2017 and has obtained her Series 7 & 66 securities licenses. Born and raised in Santa Monica, Alex obtained a B.A. in arts and architecture from the University of California, Los Angeles. Prior to joining the team, she won multiple Emmys as a makeup artist and was a personal assistant to a producer as well as the senior director at MNR Dance Factory. Her creative background and resourcefulness make her a natural fit to lead administration and marketing for the team. She provides creative outreach solutions and is in charge of client events, with a particular emphasis on educating clients' children and grandchildren as it relates to financial literacy. In her spare time, she enjoys traveling and spending time with her husband, Jason, and daughter, Harlow.

PREVIOUS EXPERIENCE

- UBS Financial Services, Inc.

FINRA LICENSES

- Series 7 and 66 securities licenses

AWARDS AND DESIGNATIONS

- Two Daytime Emmy awards

EDUCATION

- B.A., arts and architecture, University of California, Los Angeles

Michael J. Hatch, CFP®, CPWA®, CIMA®
 Executive Director Private Wealth Advisor
 310-297-3771
 Michael.hatch@morganstanleypwm.com

Kimberly Myers, CFP®
 Wealth Management Associate
 310-297-3773
 Kimberly.myers@morganstanleypwm.com

Harshal Doshi, CPWA®
 Executive Director Private Wealth Advisor
 310-297-3772
 Harshal.doshi@morganstanleypwm.com

Alexandria Settle
 PWA Registered Client Service Associate
 310-297-3775
 Alex.settle@morganstanleypwm.com

Michael Ashburn
 Business Development Specialist
 310-297-3774
 Michael.ashburn@morganstanleypwm.com

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Source: Forbes.com (Jan 2023) 2023 Forbes Best-In-State Wealth Management Teams ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/21–3/31/22. 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 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 this ranking 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.

Source: Forbes.com (Jan 2020) 2020 Forbes Best-In- State Wealth Advisors rankings awarded in 2020. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 6/30/18–6/30/19. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each 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 this ranking may not be representative of any one client’s experience. 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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Source: Forbes Magazine (July, 2018). Top Next-Gen Wealth Advisors. Data provided by SHOOKTM Research, LLC. Data as of 3/31/17. SHOOK considered Financial Advisors born in 1980 or later with a minimum 4 years relevant experience, who have: built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures: telephone and in-person interviews, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. The rating may not be representative of any one client’s experience and is not indicative of the Financial Advisor’s future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pays a fee to Forbes or SHOOK Research in exchange for the ranking. For more information see www.SHOOKresearch.com

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