

The Intersect 360 Group

at Morgan Stanley
Private Wealth Management

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As we enter the Fall season, we are happy to share our Q3 Newsletter with you. In this edition, you will find timely updates and commentary regarding the upcoming elections, back to school cyber security awareness and our new estate planning video series to provide additional education ahead of the upcoming expiration of the 2017 Tax Cuts and Jobs Act.

Morgan Stanley
WEALTH MANAGEMENT

2024 Election Insights: Perspectives for Investors

[Watch Replay](#)



US Policy Pulse

In this report, the Global Investment Committee discusses election outlook based on the most recent data.

[Read Here](#)

Preparing for Sunset A Few Notable Provisions Sunsetting at the end of 2025

The Tax Cuts and Jobs Act of 2017 (TCJA) was signed into law in December 2017. Some of the provisions of the TCJA are scheduled to sunset on December 31, 2025.



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Cybersecurity 101: Staying Safe at College

College students can be prime targets for cybercriminals. Learn how you can protect yourself.

[Read Here](#)

The Morgan Stanley Wealth and Estate Planning Series



Explore a series of educational videos covering topics such as Foundational Estate Planning Documents, Estate & Gift Taxes, Grantor Retained Annuity Trusts (GRATs), Irrevocable Life Insurance Trusts and more.

[The Gift and Estate Tax Planning Video](#)



The Estate & Gift Tax Video



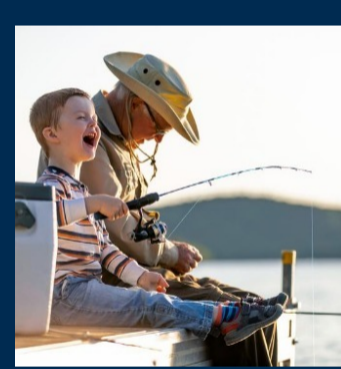
The Irrevocable Trusts Video



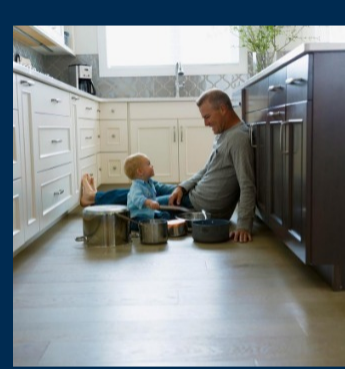
The Basics of Estate Planning Video



The Irrevocable Life Insurance Trust Video



The Generation Skipping Transfer Video



The Grantor Retained Annuity Trust Video

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A Roth conversion may not be right for everyone. There are a number of factors taxpayers should consider before converting, including (but not limited to) whether or not the cost of paying taxes today outweighs the benefit of income tax-free Qualified Distributions in the future. Before converting, taxpayers should consult their tax and legal advisors based on their specific facts and circumstances.

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