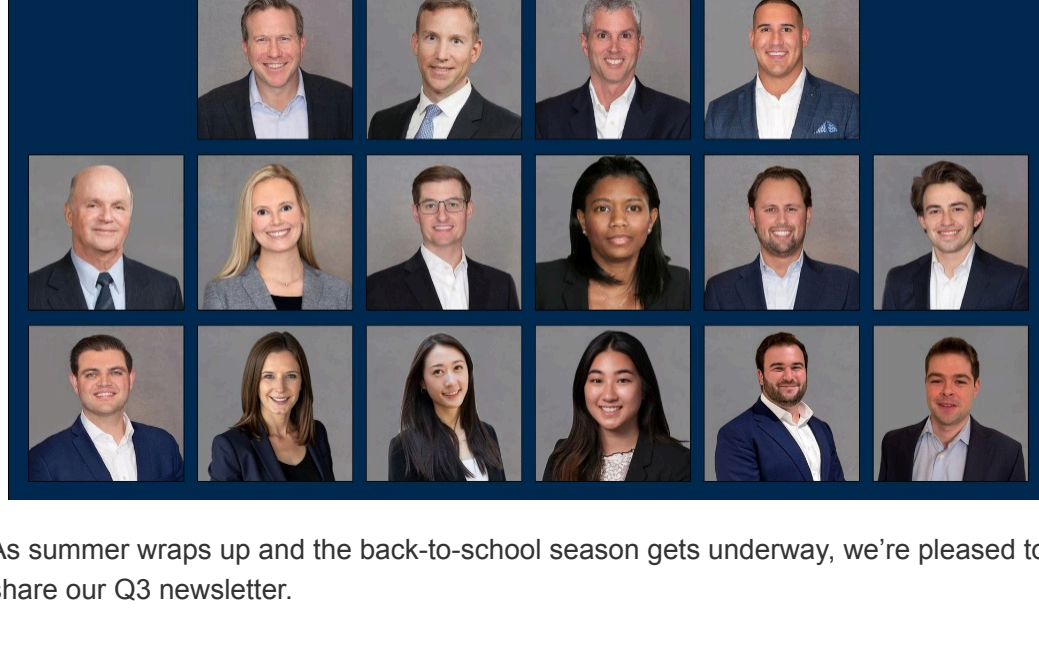


Q3 Newsletter



As summer wraps up and the back-to-school season gets underway, we're pleased to share our Q3 newsletter.

With appreciation for your continued confidence,

The Intersect 360 Group at Morgan Stanley Private Wealth Management

Team Updates

Next Gen Newsletter

In case you missed it, our latest Next Gen Newsletter was shared last month. If you would like your children or grandchildren to receive future editions, please reach out for more information.

[View the Newsletter](#)

[Join Our Next Gen List](#)

Financial Planning Resources

A New Way to Start Investing for a Child's Future



Morgan Stanley's Education Planning Center

With education costs rising, paying for college has become a major life expense that requires smart planning. Find answers to key questions here.

[Learn More](#)

Wealth Transfer Overview

Explore key considerations for transferring wealth across generations, including planning strategies, family communication, and legacy goals. This brochure offers a high-level overview to help clients begin thoughtful conversations about preserving and passing on their wealth.

[Learn More](#)

Financial Market Resources

The Economy Explained - Making It to the Middle Class in America



Market Signals: Rates, Earnings and Private Markets

Our market signals for stocks, bonds and alternatives in the second half of 2026 indicate growth, inflation and interest rates should settle at higher levels.

[Learn More](#)

Midterm Elections: More Noise Than Change?

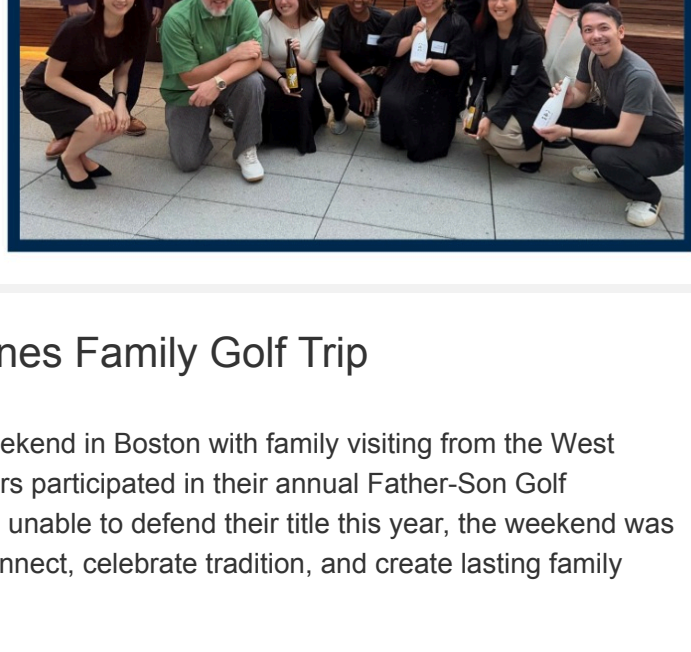
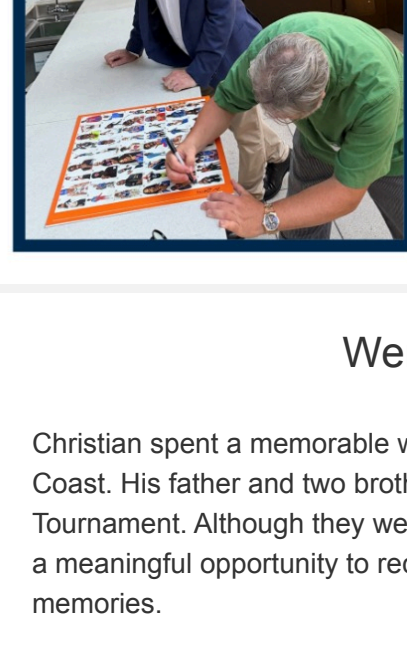
The U.S. midterms may shift the makeup of Congress, but Morgan Stanley Research expects little change to the policies that matter most for markets.

[Learn More](#)

Updates Outside the Office

Summer Sake Tasting Reception

The Intersect 360 Group hosted a summer sake tasting event in July, bringing together colleagues from Morgan Stanley and MUFG Bank for an evening of connection and cultural appreciation. Guests enjoyed a curated tasting of six distinct sake styles, complemented by a surprise appearance from famed photographer and friend of the family, Jonathan Mannion, who shared a selection of his recent Always New York campaign featured across New York City during the NY Knicks championship run.



Wennes Family Golf Trip

Coliegan spent a memorable weekend in Boston with family visiting from the West Coast. His father and two brothers participated in their annual Father-Son Golf Tournament. Although they were unable to defend their title this year, the weekend was a meaningful opportunity to reconnect, celebrate tradition, and create lasting family memories.



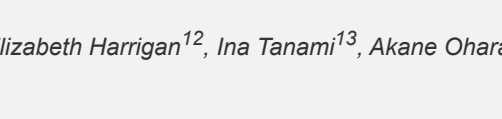
Location:
55 East 52nd Street
7th Floor
New York, NY 10055

[Visit Our Website](#)



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Team Photo

Row 1: Seth Coren¹, Scott Coren², Todd Gutkin³, Jake Rodrigues⁴

Row 2: Edward Edelman⁵, Amanda Voie⁶, Michael Ganley⁷, Shatavia Milton⁸, Kevin Oakes⁹, Christian Wennes¹⁰

Row 3: Pierce Donegan¹¹, Elizabeth Harrigan¹², Ina Tanami¹³, Akane Ohara¹⁴, Tyler Kay¹⁵, Malcolm Pakola¹⁶

Titles

- 1: Seth Coren, CFP®, CRPS® - Managing Director, Private Wealth Management, Private Wealth Advisor
- 2: Scott Coren, CFA - Executive Director, Wealth Management, Financial Advisor, Senior Portfolio Management Director
- 3: Todd Gutkin, CRPS® - Senior Vice President, Wealth Management, Institutional Consulting Director
- 4: Jake Rodrigues, CFP®, QPFC - Financial Advisor, Financial Planning Specialist
- 5: Edward Edelman - Senior Vice President, Investment Consultant
- 6: Amanda Voie, CFA*, CFP® - Assistant Vice President, Wealth Management Associate
- 7: Michael C. Ganley, CFP® - Vice President, Private Wealth Management Director of Business Strategy
- 8: Shatavia Milton - Private Wealth Management Associate
- 9: Kevin Oakes, CFP®, CRPC®, CRPS® - Assistant Vice President, Private Wealth Management Business Development Associate, Financial Planning Specialist
- 10: Christian Wennes - Private Wealth Management Analyst
- 11: Pierce Donegan - Registered Associate
- 12: Elizabeth Harrigan - Institutional Consultant
- 13: Ina Tanami - Investment Consultant
- 14: Akane Ohara - Business Development
- 15: Tyler Kay - Private Wealth Management Analyst
- 16: Malcolm Pakola - Institutional Consulting Associate

* This role cannot solicit or provide investment advice

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