

Morgan Stanley

Family Governance and Wealth Education

Our mission is to help clients maximize the value of their family capital through the transfer and preservation of the family's shared values, and the creation of an enduring family legacy.

We can help you address the complexities of transferring wealth from generation to generation, advising on specific strategies designed to preserve values and create an enduring family legacy. We will work with you to find processes, structures and strategies that help you and your family use your financial capital to strengthen, enhance and perpetuate meaningful, fulfilling and engaged lives.

Working with your Financial Advisor as well as your legal and tax advisors, the Family Governance and Wealth Education Group assists families in creating and implementing processes and structures designed to address the challenges of intergenerational wealth transfer. While every family is different, we have helped some of the world's most prominent families, in coordination with their outside advisors, focus on the following:

- Creating family mission statements
- Creating family governance structures and family governance documents
- Structuring and leading family meetings and family retreats
- Creating business succession plans
- Advising on family offices or alternative structures
- Integrating the family's shared values into its estate planning or wealth management vehicles
- Advising on the family's global wealth structuring issues
- Creating strategies to help address the challenges that a troubled family may face
- Creating strategies to enhance the integrity of the family's wealth management structures, and to help preserve and enhance the independence and protection of fiduciaries
- Creating family wealth education plans



For many, the challenges of passing financial wealth on to descendants are more complicated and daunting than planning for gift or estate tax. But it doesn't have to be that way.

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