Morgan Stanley | Wealth Management

The Johnson Group at Morgan Stanley
March Newsletter

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Welcome to our March newsletter. This month, we're sharing a research piece, timely AI insights, an article on 2026 tax planning considerations following the "One Big Beautiful Bill Act," and a reminder of why having a clear investment goal matters—along with our "On the Markets" update. We hope you enjoy our newsletter, and please feel free to reach out with any questions or feedback.

TEAM SPOTLIGHT

With March Madness around the corner, we wanted to take a moment to spotlight Ryan this month. Ryan has a long-standing connection to the game by being a player himself and giving back to the sport through coaching in his free time. This tournament reminds our team of the excitement and energy that comes with teamwork and resilience. Just like the basketball teams competing on the court, our team thrives on collaboration and performing under pressure to achieve the best outcomes for our clients. We look forward to watching all the teams compete and are inspired by their dedication and spirit.

INVESTOR RESOURCES

Global Markets Adjust to U.S. Tariff Reversal

A landmark ruling by the U.S. Supreme Court voids existing tariffs, prompting investors, companies and policymakers to reassess trade impacts.

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Private Companies Are Creating New Frontiers in Innovation

Private companies are driving breakthroughs across industries—from space-based data centers and autonomous vehicles to AI-powered healthcare tools.

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Tax Season 2026: Planning After OBBBA

How could the One Big Beautiful Bill Act shape your taxes and household finances? Top thought leaders share insights.

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Global Pulse - Implications of the War on Iran

This report addresses:
1. three possible scenarios for Iran; 2. key implications for global investors; and 3. the meaning of the Supreme Leader to Shia Muslims.

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On the Markets
Exploiting Rotation's Excesses

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FROM OUR TEAM

As our valued client, we sincerely thank you for your continued support and trust in our services, your partnership is greatly appreciated.

Pictured above from left to right: Thomas Aguna - Portfolio Associate, Winona Livingston - Wealth Management Associate, Michael Algarin - Financial Advisor, Damon Johnson - Financial Advisor, Danielle Barabino - Wealth Management Associate, Ryan Beddeo - Financial Advisor

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