

# THE LEV ROURK GROUP AT MORGAN STANLEY INVITES YOU TO OUR 17<sup>th</sup> Annual Client Event

July 30, 2025 at 6PM

at our new office space: 1200 Franklin Ave Garden City NY

**RSVP: Andrea Fox 516-227-2836**

**Healthy, Wealthy and Wise**

Please join us for an evening with Dr. Kimberly Henderson. Dr. Henderson is a Managing Director and is the Head of Wealth Management Health and Wellness Education for Family Office Resources. In this role, she highlights opportunities for clients to consider healthy choices, spearheads thought leadership on healthcare issues facing ultra high net worth clients, shares best wellness practices and discusses the impact of health and medical developments with clients and their families.

**Speaker:**

Dr. Kimberly Henderson  
Morgan Stanley  
Family Office Resources  
Managing Director

**Market Update Presented and Sponsored By:**

|   |  |   |  |  |   |
|---|--|---|--|--|---|
| Missy Longo<br>Vice President<br><b>PIMCO</b><br><a href="mailto:Missy.Longo@PIMCO.com">Missy.Longo@PIMCO.com</a> | Franklin Longo<br>Senior Vice President<br><b>State Street Global Advisors</b><br><a href="mailto:Franklin.Longo@ssga.com">Franklin.Longo@ssga.com</a> | Keith Albertina<br>MD, Private Wealth Advisor Consultant<br><b>Nuveen</b><br><a href="mailto:Keith.Albertina@nuveen.com">Keith.Albertina@nuveen.com</a> | Jason Smilovitz<br>VP, Regional Director<br><b>Fred Alger Mgmt</b><br><a href="mailto:Jsmilowitz@alger.com">Jsmilowitz@alger.com</a> | Erin Vollmuth<br>Director, Long Island Market Leader<br><b>Blackrock</b><br><a href="mailto:Erin.Vollmuth@blackrock.com">Erin.Vollmuth@blackrock.com</a> | Enrique Gutierrez<br>VP, Regional Director – Long Island<br><b>Goldman Sacks Asset Mgmt</b><br><a href="mailto:Enrique.Gutierrez@gs.com">Enrique.Gutierrez@gs.com</a> |
|---|--|---|--|--|---|

**Hosted By:**

**The Lev Rourk Group at Morgan Stanley**  
[advisor.morganstanley.com/the-lev-rourk-group](http://advisor.morganstanley.com/the-lev-rourk-group)

Judith Wilkens Lev, SIMC  
Senior Vice President  
Financial Advisor  
1200 Franklin Avenue Garden City, NY 11530  
516-227-2899

Corey D. Lev CFP, CRPC  
Senior Vice President  
Financial Advisor  
1200 Franklin Avenue Garden City, NY 11530  
516-227-2930

Ronald Rourk, CFP  
First Vice President  
Financial Advisor  
3801 PGA Blvd Palm Beach Gardens, FL 33410  
561-694-7064

Guest speakers are neither employees of nor affiliated with Morgan Stanley Smith Barney LLC. Opinions expressed by guest speakers are solely their own and do not necessarily reflect those of Morgan Stanley.

There will be no discussion of, or distribution of written materials relating to specific products or investments at this presentation.

The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Principal value and return of an investment will fluctuate with changes in market conditions. Estimates of future performance are based on assumptions that may not be realized. For any potential forward-looking statements, there can be no guarantee that they will come to pass.

Tax laws are complex and subject to change. Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Individuals are urged to consult their personal tax or legal advisors to understand the tax and legal consequences of any actions, including any implementation of any strategies or investments described herein.

Overlay Managers or Executing Sub-Managers ("managers") in some of Morgan Stanley's Separately Managed Account ("SMA") programs may affect transactions through broker-dealers other than Morgan Stanley or our affiliates. If your manager trades with another firm, you may be assessed costs by the other firm in addition to Morgan Stanley's fees. Those costs will be included in the net price of the security, not separately reported on trade confirmations or account statements. Certain managers have historically directed most, if not all, of their trades to outside firms. Information provided by managers concerning trade execution away from Morgan Stanley is summarized at: [www.morganstanley.com/wealthinvestmentsolution/pdfs/adv/sotresponse.pdf](http://www.morganstanley.com/wealthinvestmentsolution/pdfs/adv/sotresponse.pdf). For more information on trading and costs refer to the ADV Brochure for your program(s), available at [www.morganstanley.com/ADV](http://www.morganstanley.com/ADV), or contact your Financial Advisor/Private Wealth Advisor.

Investments and services offered through Morgan Stanley Smith Barney LLC. Member SIPC