Morgan Stanley

The Lewis / Westendorf Group

Jorge Gonzalez, Jane Fitzpatrick, Grant Lewis, Nicholas Westendorf, Amethyst Lewis, Patricia Smith, Andrea Wright

101 West Broadway
Suite 1800
San Diego, CA 92101
https://advisor.morganstanley.com/the-lewis-westendorf-group

“An investment in knowledge pays the best interest.” - Benjamin Franklin

Life Delivers Surprises.

It’s Inevitable. And whether stemming from your personal life or global events, these surprises can have a “ripple effect” on your wealth. Put simply, your financial life is a puzzle where the pieces are always changing. Often, the more wealth you have, the more “pieces” you’ll have to jigsaw.

At The Lewis / Westendorf Group, we help you fit all the pieces of your financial life together – and help keep them together – so that you never lose sight of the big picture: long-term financial security for you and your family.

The Foundations of Our Top-Tier Wealth Management Service:

- **Deep, Diverse Experience –** With 146+ years of combined experience in everything from financial planning and retirement income planning, to alternative investments, lending, and charitable giving strategies, we’re able to help clients navigate every step of their financial journey.
- **Elite Designations –** Our Certified Financial Planner® (Grant Lewis), Certified Exit Planning Advisor® (Nicholas Westendorf) & Portfolio Managers (Grant Lewis & Nicholas Westendorf) designations help give you access to leading industry insights and resources to help you reach your goals.
- **Comprehensive & Streamlined Approach –** By combining our skillsets and areas of knowledge, our team helps you take a truly holistic and efficient approach to your financial future.

Nicholas Westendorf has 9+ years of experience. Grant Lewis has 17+ years of experience. Jane Fitzpatrick has 42+ years of experience. Amethyst Lewis has 4+ years of experience. Andrea Wright has 27+ years of experience. Patricia Smith has 35+ years of experience. Jorge Gonzalez has 12+ years of experience.

When You Call, We Answer

Trust is at the heart of all our client relationships.

Each and every day, we work diligently to earn that trust through actions big and small. Especially when our clients are going through difficult moments – health concerns, divorce, the passing of a loved one, etc. – we pride ourselves on providing a "continuity of care."

Over the years, we've helped many clients during the challenging times in their lives, the economy, and the world more broadly. As our client, we want you to lean on us.

We're always here to be your steady guide.

Our Multigenerational Mindset

While our clients come to us with many different concerns, there's one we hear more than any other:

"In my absence, what will happen to my loved ones? Who will care for their financial well-being?"

As your wealth management team, we do everything in our power to help financially protect your family. In fact, we treat them as if they were our clients too.

A Family-Oriented Practice

Combining experience and youth, we're a diverse team of men and women spanning every generation from Baby Boomer to Millennial. We're proud of that diversity, and we believe it helps us meet the unique multigenerational needs of your entire family.

A Family-Rooted Value System

- Trust
- Openness
- Commitment
- Education

These family values are the four pillars of our practice. More than that, they are our unwavering promise to you and your loved ones.

A Family-Driven Approach

What does it mean to approach your wealth management like a "family office"? For us, it means a lot of things, such as:

- Collaborating with your professional network of attorneys, accountants, etc.
- Communicating actively with whomever you'd like to bring into the fold of your financial planning process
- Meeting with your adult children, when appropriate, to help them develop healthy spending, saving, and investment habits
- Helping you craft and execute the kind of legacy you want to leave

87 – Years Morgan Stanley has been committed to clients and communities[2]

Morgan Stanley By the Numbers

1,200 – Number of Morgan Stanley Offices around the world[3]

$4.9 Trillion – Morgan Stanley Wealth Management Assets Under Management as of January, 2022[8]

Global Resources, Personal Service

When done right, wealth management is a science and an art.

Particularly as you accumulate wealth, you shoulder a unique set of needs that require creative problem solving, extensive industry knowledge, and resources to address.

As an experienced advisory team at a global wealth management firm, we deliver both.

Global Resources

OUR RELATIONSHIP WITH MORGAN STANLEY ALLOWS US TO ADDRESS ALL THE DIFFERENT COMPLEXITIES OF HIGH-NET-WORTH WITH:

- Cutting-Edge Investment Platforms
- Intuitive Client-Facing Technology
- World-Class Financial Research
- Customized Credit Solutions

Above & Beyond Service

ALONG WITH AN ELITE WEALTH MANAGEMENT STRATEGY, WE STRIVE TO OFFER A SUPERIOR CLIENT EXPERIENCE. OUTSIDE OF OUR TAILORED REVIEW MEETINGS, WE'RE HERE FOR YOU WHENEVER YOU NEED US.

Here are some of the ways we go above and beyond:

- We help you decide if now is the right time to buy a second home
- We serve as your sounding board for matters financial and otherwise
- We help you work through family dynamics around financial matters
- We discuss the state of the economy and how it might affect your plan
- We help empower your children and grandchildren with financial education
- We proactively help you steer clear of risky financial decisions

At the end of the day, we're committed to helping you and your family in whatever way we can.

[2] https://www.morganstanley.com/about-us/history [3] https://www.linkedin.com/company/morgan-stanley [8] https://www.marketwatch.com/story/morgan-stanley-ceo-sees-a-path-to-10-trillion-in-assets-under-management-as-stock-rally-continues-11642703595

Our “Outside the Box” Approach

For all our industry experience, we have yet to come across two clients with the exact same vision for the future.

The individuals and families we work with today are as diverse as our team. They come to us from all walks of life- some from right here in San Diego, others from as far away as Alaska – and they work in many different industries.

That’s why we provide you with a customized financial strategy. It’s the only way we can properly address your unique set of objectives, challenges, family dynamics, timelines, and risk-appetites.

We root our approach in the skills and knowledge we’ve acquired over decades in the industry, while providing “outside the box” solutions to help you overcome your unique challenges.

Clients come to us from all walks of life. Our highly-experienced team helps them navigate and transition confidently through every stage of their financial journey. We're here for you, your family, and your legacy.

A Team of Professionals

Grant Lewis

Email: Grant.Lewis@morganstanley.com

Tel: (619) 238-6272

Grant Lewis, CFP® is a Senior Vice President, Financial Advisor, Portfolio Manager, and Lending Specialist with The Lewis / Westendorf Group at Morgan Stanley. For over 17 years, Grant has helped individuals and families plan their financial futures, overcome their obstacles, and achieve their long-term objectives with a comprehensive wealth management approach.

A graduate of the University of Idaho, Grant first entered the financial industry in 2005 with Wells Fargo, where he focused on banking, lending, and investing. A year into his tenure at the firm, he became an Associate Financial Consultant. Throughout his career, he has always sought to offer his clients the best resources and knowledge available. It's why he came on board with Morgan Stanley as a Financial Advisor in 2009; it's with that same drive that he co-founded The Lewis / Westendorf Group in 2022.

CA Insurance License #0G48784
NMLS #1278966

Nicholas Westendorf

Email: Nicholas.Westendorf@morganstanley.com

Tel: (619) 544-6554

Nicholas Westendorf, CEPA® is a First Vice President, Financial Advisor, Alternative Investments Director, Portfolio Manager, and Lending Specialist with the Lewis / Westendorf Group at Morgan Stanley. Nicholas works with individuals, families, and businesses to provide custom financial solutions. He takes a tailored approach to identify specific goals or problems and utilizing Morgan Stanley's extensive reach to provide solutions. He focuses on flexibility, wealth preservation strategies, and the ability to act quickly when his clients have opportunities or needs that arise. Nicholas helps individuals with large concentrated stock positions tax efficiently diversify their holdings and reduce risk. He works closely with commercial real estate owners to offer strategies to help defer taxable consequences in the sale of property. He and his team assist business owners in preparing for the sale of their business and support building out a tax efficient exit strategy.

CA Insurance License # 0I91880
NMLS #1290684

Jane Fitzpatrick
Email: Jane.Fitzpatrick@morganstanley.com

Tel: (619) 238-6219

Jane Fitzpatrick is a Vice President and Financial Advisor with The Lewis / Westendorf Group at Morgan Stanley in downtown San Diego. Working with retirees, executives, multigenerational families, and more. Jane supports her clients with a deep well of financial knowledge accumulated over her 42+ years in the industry. After receiving her Bachelor of Business Administration degree from the University of San Diego, Jane began her career in finance in 1980 as a Sales Assistant with Dean Witter (a firm which eventually merged with Morgan Stanley). She has served in varied capacities throughout her career including Operations Manager, Branch Administrative Manager and Risk Officer for the Complex. In 2016, looking to connect in a more meaningful way with clients, Jane was asked to join the Dyer / White Group which is now the Lewis / Westendorf Group.

CA Insurance License #0F40982
NMLS #1498386

Amethyst Lewis
Email: Amethyst.Lewis@morganstanley.com

Tel: (619) 238-6222

Amethyst Lewis is a Financial Advisor, QPFC, and Financial Planning Specialist with The Lewis / Westendorf Group at Morgan Stanley in San Diego. With a special emphasis on financial planning, Ame helps clients envision, work toward, and reach the financial futures they envision for themselves and their loved ones. Ame is a graduate of San Diego State University where she earned a Bachelor's Degree in Business Administration and Management. Before transitioning to wealth management in 2020, she owned and managed a local adult residential facility, and served on the executive committee of the Pacific Arts Movement among other jobs in management, marketing, and consulting.

CA Insurance License #0H95789
NMLS #2049894

Andrea Wright
Email: Andrea.Wright@morganstanley.com

Tel: (619) 544-6519

Andrea Wright is a Senior Registered Associate with The Lewis / Westendorf Group at Morgan Stanley in San Diego. With over 27 years of industry experience, Andrea helps provide clients with exceptional administration and operations experience expected of an elite wealth management service. Andrea began her career in finance in 1997 with Dean Witter, which would go on to merge with Morgan Stanley. Throughout her career with the firm, she has worked in various facets of wealth management as an Operations Manager and Transition Specialist. This has equipped her with a deep understanding of clients' needs and obstacles. She holds the Series 7 and Series 66 licenses.

Outside the office, Andrea lives in San Diego. In her free time, she enjoys travelling, spending time with family and friends, and seeing as much live music as she can. Deeply committed to the local arts scene, she volunteers for various San Diego music and festival events.

Patricia Smith
Email: Patricia.M.Smith@morganstanley.com

Tel: (619) 544-6517

Patricia is a Senior Registered Associate and holds the Series 7, Series 63 and Series 65 licenses. In 1989 she began working at Shearson Lehman Hutton, and after several mergers, the firm became Morgan Stanley. Pat provides full administrative and operational support with extensive direct client interaction. She is firmly committed to long-term relationships and strives to deliver exceptional client service.

In her free time, Pat enjoys photography and gardening. As a San Diego native, she loves the ocean and getting out on the water whale watching as often as she can. Pat earned a 2nd degree black belt in karate and maintains an interest in the discipline.

Jorge Gonzalez
Email: **Jorge.L.Gonzalez@morganstanley.com**

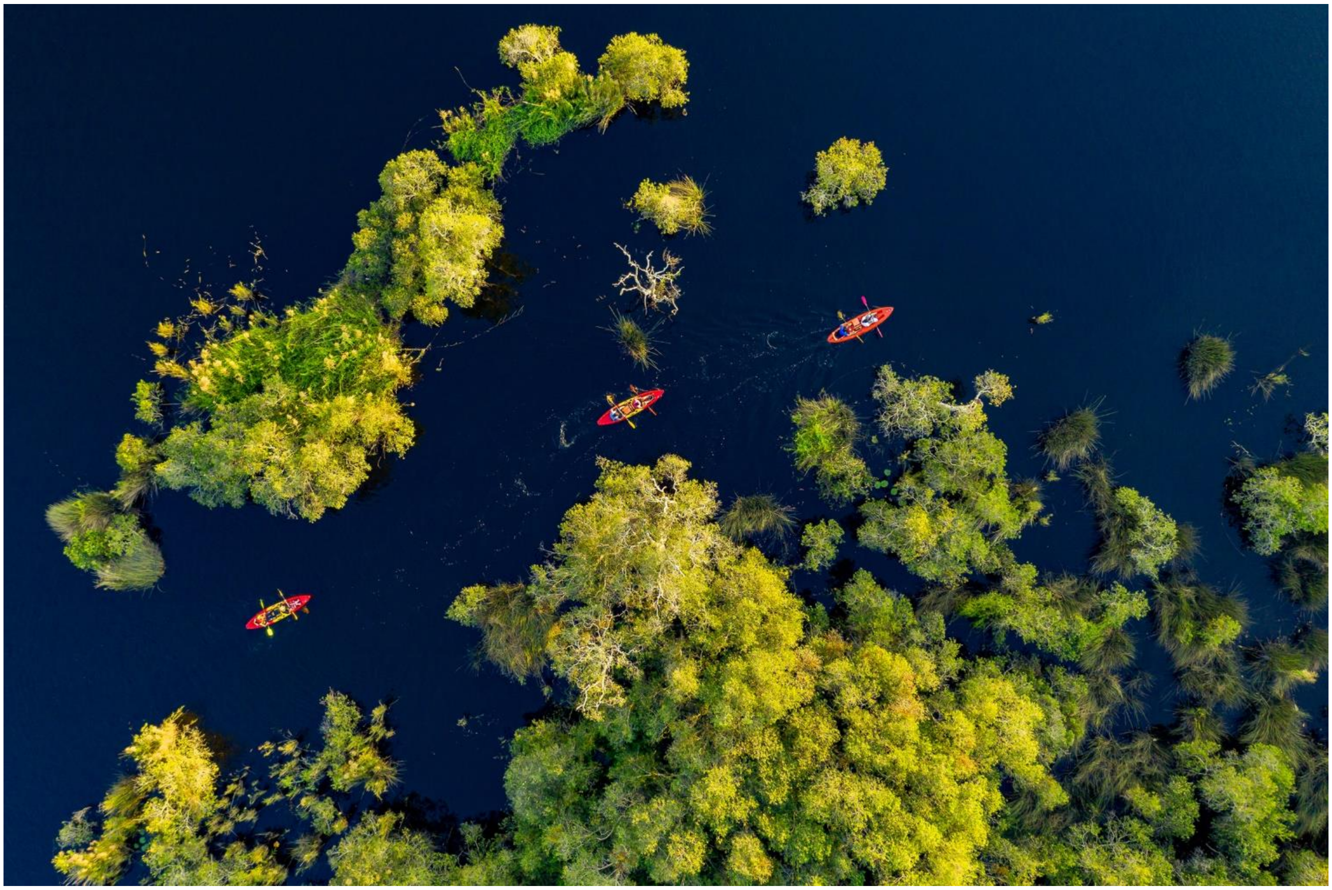
Tel: (619) 238-3406

Jorge has worked in the financial industry since 2012, starting his career with Wells Fargo Bank as a relationship manager.

Throughout his career, Jorge has focused his skillset on growing and maintaining client relationships, working closely with multiple teams of Financial Advisors.

Jorge attended San Diego State University where he earned a BA in Public Administration, which allowed him to gain financial knowledge that he incorporates into his work daily. He is Series 7 and Series 66 licensed. His credentials are an invaluable asset to the team, adding to its ability to service client needs immediately and personally – all while providing a superior level of service.

Outside of work, Jorge enjoys spending time with family and friends. He can be found travelling to new places and also golfing with friends on the weekends.



In Summary

With The Lewis / Westendorf Group at Morgan Stanley, you receive the knowledge, resources, and commitment of an elite wealth management team. Each and every day, we work tirelessly with one objective in mind: to help you reach yours.

Let's get started.

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