Morgan Stanley

Wealth Management

The Lineage Group at Morgan Stanley

Family Gifting Strategies & The Tax Sunset

Monday, September 9th, 4:30 pm EST on Zoom

Please join our virtual Family Gifting Strategies & The Tax Sunset Webinar on Monday, September 9th at 4:30 pm EST. We will feature Vanguard's financial planning and coaching strategist , Julia Fuentes, to discuss gift planning.

RSVP Here >

Agenda:

- Estate and Lifetime Gifting Taxes

If you have a specific question you would like to ask in advance, please email: thelineagegroup@morganstanley.com.

Speaker Information

Julia Fuentes
Vanguard

Julia Fuentes, CIMA®, WMS™, currently serves as Vanguard's financial planning & coaching strategist, responsible for growing and enhancing financial planning offers designed to support Vanguard's financial advisor partners. Since joining Vanguard in 2008, Mrs. Fuentes has assisted financial advisors with their investment strategy, practice management, and sales needs. She has also offered investment solutions and portfolio construction guidance for financial advisors while managing Vanguard ETF® Strategic Model Portfolio service.

Prior to Vanguard, Mrs. Fuentes was a financial specialist with Wachovia Securities and a credit manager at Wells Fargo Financial. She earned her B.S. in finance and marketing from Bloomsburg University.

We hope that you can join us!

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Picured L to R: Brianne Smith(Client Service Associate),David Ferris Jr.(Finacial Advisor),Robin Grace (Financial Advisor),Robin Seidman(Financial Advisor),Kacie Lang(Registered Client Service Associate),David Ferris (Financial Advisor)