

Spring Newsletter 2026

The Loscalzo Group At Morgan Stanley

We're pleased to share our April newsletter in recognition of Financial Literacy Month. Inside, you'll find some practical insights to support financial literacy, and two replay sessions from our ongoing webinar series, Wealth Education for the Next Generation. You can also find a few team member updates that we're excited to share with you!

These resources are designed to be helpful and easy to share—please feel free to forward this email (including the replay links) to anyone you think may benefit from them.

As always, please reach out if you'd like to discuss any of the topics below or how they may relate to your goals.

Exciting News From The Team

Terese was named to the 2026 Forbes Best-In-State Wealth Advisors list for Arizona.¹



Please join us in congratulating Anthony on getting married last month!



Spring Insights



Wealth Education for the Next Generation: Virtual Client Event Replays

March 2026:

Understanding Risk and Volatility

February 2026:

Cryptocurrency and Digital Assets 101

[Watch the Replays Here](#)



6 Steps to Financial Literacy

April is Financial Literacy Month! While you may have a good grasp of your finances, taking some time to brush up on the basics can help you navigate major money decisions.

[Read More](#)

The Loscalzo Group

At Morgan Stanley

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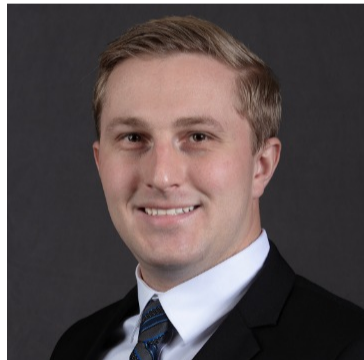


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1. 2026 Forbes Best-In-State Wealth Advisors

Source: Forbes.com (Awarded 2026). Data compiled by SHOOK Research | LORC based 12-month time period concluding in June of 2026 prior to the issuance of the award. [Awards Disclosures](#) | [Morgan Stanley](#)

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