



Q1 Newsletter

The Loscalzo Group At Morgan Stanley

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We hope you had a wonderful holiday season spent with loved ones. As we celebrate the start of 2025, we want to share some team member updates as well as a few timely insights to help you start off the new year successfully. Please reach out if you have any questions or would like to schedule a meeting.

New Team Member Announcement

As you know, Connie, our previous client service associate retired last month. With this news, we wanted to take this opportunity to introduce the newest member of of The Loscalzo Group who will be taking over her responsibilities:



Pamala Price
Senior Register Client Service Associate

Pamala is our primary client support liaison for executing day-to-day time sensitive tasks and client requests. She brings over thirty years of banking and investment experience and a positive, “can do” attitude that our clients appreciate. Pamala enjoys building personal relationships with our clients and providing worry-free solutions to some of life's daily stressors.

Pamala was born and raised in Tucson, Arizona where she attended Pima College. Prior to joining Morgan Stanley, Pamala worked as a Senior Client Service Associate for Merrill Lynch and Wells Fargo Advisors.

Most Treasured Thing I Own: An ankle bracelet that belonged to my mom.
Hobbies: When the weather is warm, I love being outdoors. I also enjoy cooking and spending time with family.
One Piece of Advice: The only way to chew an elephant is one bite at a time. When you have a big task, it helps to break it down into smaller tasks as to not become overwhelmed.

New Year Insights

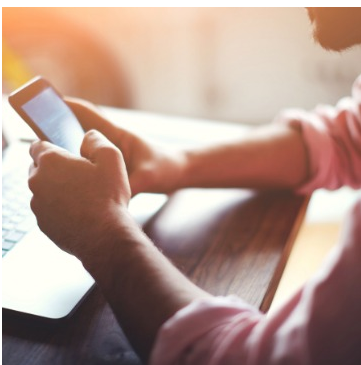
Get prepared for 2025



6 Financially Smart Ways to Start 2025

Heading into 2025, it's time to take stock of your budget, debt and investments—and check them against your financial goals.

[Read More](#)



Preparing for Tax Season

As tax filing deadlines approach, you can prepare for this year's taxes and next year's planning with the updated 2024 and 2025 tax tables.

[2024 Tax Tables](#) | [2025 Tax Tables](#)



How Investors Can Prepare for Trump's First 100 Days

The GOP's 2024 U.S. election result sets the stage for pivotal shifts in policy. Discover what investors should expect for the economy and key equity sectors. Click below to read more.

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Pamala Price

Senior Registered Client Service Associate

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