



The MCM Group

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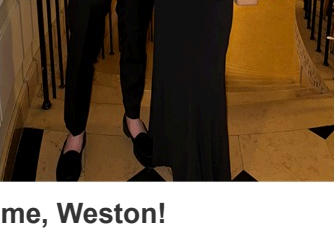
As we wrap up the first quarter of 2026, we find ourselves reflecting on a season defined by growth—both for our team and the families we serve. It has been an incredible start to the year, and we are honored to share that MCM has been recognized by **Forbes 2026 Best-In-State Wealth Management Teams** for four consecutive years. (2023-2026)

While awards are a wonderful nod to our process, our true "north star" remains the continued trust you place in us. Below, we've rounded up some of the personal and professional milestones that have made this quarter one to remember.

Warmly,

The MCM Group

Matt, Paul, Todd, Rob
Lauren, Lindsey, Nick, and Katie

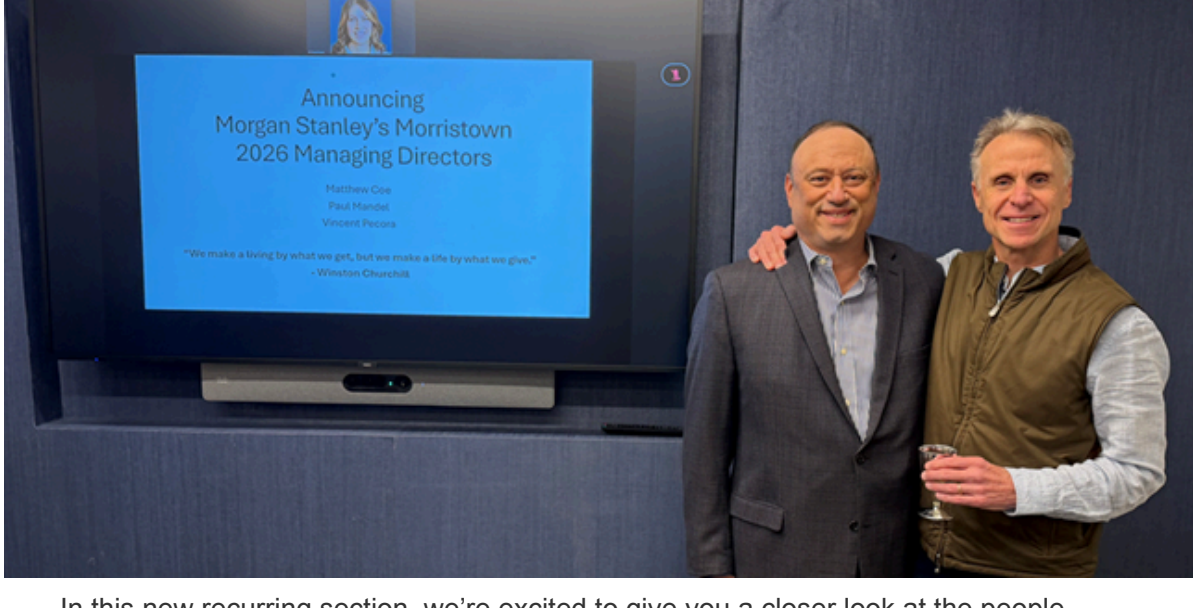


The Next Generation: Welcome, Weston!

The MCM family officially grew by one on February 18th, 2026. Rob and Molly welcomed their son, **Weston Theodore Coe**, into the world. While he's currently focusing on his nap schedule, we suspect we might have a future MCM partner on our hands!

Amidst the new-parent haze, Rob also reached a major professional milestone, being named **Associate Vice President**. Way to go, Rob!

Team Member Spotlight Series



In this new recurring section, we're excited to give you a closer look at the people behind your portfolio.

This quarter, we're celebrating a "double promotion" for **Matt Coe**. Not only did he earn the prestigious title of "PopPop" with the arrival of his first grandchild, but he and founding partner **Paul Mandel** were also named Morgan Stanley's newest **Managing Directors!**

This is the highest title an advisor can earn in our industry, representing decades of dedication and commitment. We sat down with them to hear their perspective on this achievement.

What does being named Managing Director mean to you?

Paul shared that "this title represents the culmination of 36 years in Wealth Management at one firm." While the practice has evolved significantly since he began—with changes in business dynamics, client needs, and expectations—he expressed pride in the team's ability to adapt and grow.

Matt emphasized that although the two founding partners ultimately received the designation, "it was the hard work, grit, and collaboration of the entire team, over many years, that made this possible." Both noted that becoming a Managing Director was never a specific goal, but rather a natural result of their commitment to clients and to building a strong team culture.

Morgan Stanley's Culture & Firm Commitment

Paul, who has spent his entire career at Morgan Stanley, highlighted the firm's strong culture and core values—giving back, a commitment to diversity, and delivering exceptional client service—as key differentiators. He added that the firm's industry leadership in wealth management is a source of pride and sets it apart from its peers.

A Word to Their Younger Selves

We asked: if you could give advice to your younger self at the start of your career, what would it be?

Both Paul and Matt emphasized the importance of adaptability in wealth management. As Paul noted, "change is constant in life, and uncertainty is inevitable." As founding partners of The MCM Group, they also reflected on being early adopters of the team-based model. Matt highlighted that this structure encourages "cross-pollination of ideas and helps enhance overall service," ultimately benefiting the clients they serve. Despite the evolution of the industry, they remain confident in their decision to pursue financial advising and feel grateful for the work they do each day. What an incredible milestone!



Spring Reading

Morgan Stanley Research's key investment themes for this year are Tech Diffusion, The Future of Energy, The Multipolar World and Societal Shifts.

Take a look at our new piece: [Investment Outlook 2026: Key Themes Shaping Global Markets | Morgan Stanley](#)

Oil shocks don't just affect gas prices—they feed into transportation, manufacturing, food and broader inflation expectations. If crude remains elevated, the U.S. economy could face a more difficult mix of sticky inflation and a slowing growth, which may influence both Fed policy and political sentiment heading into the 2026 midterms.

Click Here to Learn More: [Iran War Oil Shock: Stock Market Impacts | Morgan Stanley](#)



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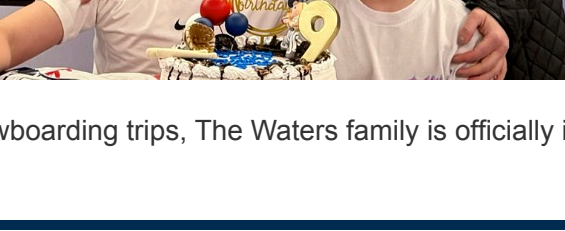
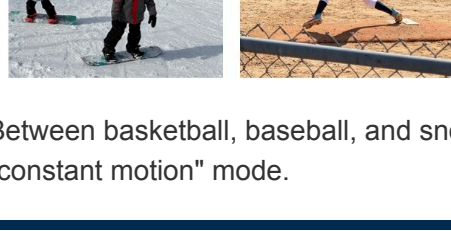
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Speaking of milestones, The Kohler family celebrated her big sister Daphne's 1st birthday. Only a year old and she is always in action with her big sister Veronica (5)!



Between basketball, baseball, and snowboarding trips, The Waters family is officially in "constant motion" mode.



Lauren and her husband, John, have kicked off 2026 with trips to Florida and Boston. They are also continuing to settle in their new home purchased last year!



Since becoming a full-time team member Katie has become fully registered with her Series 7 and Series 66 licenses. She is excited to be apart of such a high-level team and recently forward to growing with MCM!

Nick recently celebrated his **5-year anniversary** with Morgan Stanley and earned a well-deserved promotion to **Portfolio Associate**. Congratulations, Nick, on your dedication to The MCM mission!

What have you been up to this year?

[Schedule a meeting to catch up.](#)

Team Photo: Matthew Coe, Financial Advisor, Paul Mandel, Financial Advisor, Todd Waters, Financial Advisor, Robert Coe, Financial Advisor, Lindsey Kohler, WM Associate, Lauren Legband, Business Development Associate, Nick Price, Portfolio Associate

2023-2026 Forbes Best-In-State Wealth Management Teams Source: Forbes.com 2026 Forbes Best-In-State Wealth Management Teams ranking awarded in 2023-2026. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in March of the previous year the award was issued, having commenced in March of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC, for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each Financial Advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. These rankings are not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

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