Morgan Stanley

The McLain, McNew, Penno Group at Morgan Stanley

Brian McNew, Vice President, Financial Advisor, Portfolio Management Director

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Below you'll find more information on our onboarding process including what the first 100 days look like and more on some of the tools we have here at Morgan Stanley:

New Client Experience: 1st 100 Days –

- Meeting Date (Day 0): At document signing, you will receive a welcome folder containing more information about our team. Our Client Service Associate, Alice Slopow, will assist you with setting up your Morgan Stanley Online login and features walkthrough.
- Day 7: Alice will call you with transfer status.
- Day 15: We'll give you a call to ensure that you have received your first statement and confirm receipt of any checkbooks or debit cards.
- Day 30: We'll give you a call to check-in to set up a 45-day appointment.
- Day 45: Client Appointment - We'll check-in with you and review the transfer process.
- Day 100: Client Appointment: Review your portfolio - This is where the normal client experience begins.

Morgan Stanley Online –

Register for Morgan Stanley Online

Follow the enrollment link in your inbox from Morgan Stanley or visit morganstanley.com/online. Give Sherie a call for your account number.

Download the Morgan Stanley App

Search for "Morgan Stanley Wealth Management" in the iPhone/iPad App Store or Android Google Play Store.

Stay Informed

Use Morgan Stanley Online regularly to stay informed and keep track of your financial goals.

Stay Connected

Connect with us on our team Facebook page and Brian McNew and Leland Penno's LinkedIn pages. We find connecting with you on social media to be meaningful for getting to know each other better and for us to keep you up to date with timely information.

If you have any questions, please feel free to reach out to our service associate, Alice Slopow. She'll be able to help out with:

- Scheduling appointments
- Transfers from your account
- Setting up online access to your account (Morgan Stanley Online)
- Check reorder, check copies, credit card
- Questions about your statement or other paperwork
- Updating your information