Morgan Stanley

The McLain McNew Penno Group at Morgan Stanley

Welcome to McLain, McNew, Penno Group Wealth Management! We are excited to begin this journey with you. Thank you for placing your trust and confidence in our team as we help you design a personalized financial plan.

Your Financial Advisors:

Brian McNew
Vice President, Financial Advisor
Portfolio Management Director

Leland Penno
Vice President, Financial Advisor
Portfolio Management Director

Your financial advisors can guide you through:

- Financial planning to help you achieve your lifestyle objectives
- Retirement planning and solutions (including accumulation, retirement income, Social Security, and healthcare)
- Estate planning strategies and trust services, including special needs planning
- College/Education planning
- Life, long-term care, and disability insurance analysis and review
- Fee based and managed money services
- Investment and asset management services
- Business planning
- Philanthropy-endowments, foundations, and donor advised funds
- Tax planning strategies and coordination with your tax professional
- Cash Management and Lending Solutions

Your service associate:

Alice Slopow
Client Service Associate

- Scheduling appointments
- Account balances, positions and values
- Deposits, withdrawals, wires, and transfers from your account
- Check reorder, check copies, credit card
- Updating your information (name or address change, etc.)
- Questions about your statement or other paperwork
- Tax documents (1099 forms, year-end statements, etc.)
- Setting up online access to your account

Morgan Stanley Online: www.MorganStanley.com/online

- Enroll and download the app to your mobile devices
- View and access your Morgan Stanley account balance, activity, and investment holdings
- Make transfers between Morgan Stanley accounts and other financial institutions
- Make deposits and pay bills electronically, Send money with Zelle
- Electronically authorize wires and other transactions
- See your total wealth from all your financial institutions
- View and download your statements and tax documents
- Check future dividends and interest payments

- Get quotes, news, research, and economic outlook

The enclosed welcome packet will help familiarize you with Morgan Stanley, our team, and your accounts. You will find:

- Service Platform
- Instructions to enroll in Morgan Stanley Online
- Guide to your Morgan Stanley statements

We are dedicated to our clients and committed to delivering exceptional client service while providing comprehensive wealth management. We look forward to working with you to help you meet your financial goals.

The McLain McNew Penno Group

Brian McNew, Vice President
Portfolio Management Director | Financial Advisor
Phone: 202-862-9151 | Fax: 202-254-5663 | Email: Brian.McNew@morganstanley.com
NMLS ID 1255362

Leland Penno, Vice President
Portfolio Management Director | Financial Advisor
Phone: 202-862-9101 | Fax: 202-654-5703 | Email: Leland.Penno@morganstanley.com
NMLS ID 1552211

Alice Slopow
Client Service Associate
Phone: 202-862-9139 | Email: Alice.Slopow@morganstanley.com