The Wildemore Munera Group at Morgan Stanley
We believe that a financial plan is successful only to the extent that it helps you achieve your life goals. Your strategy should support the way you choose to live, and reflect the values that you and your family share. It should cover every aspect of your financial life, allowing you to focus on what really matters to you: your family, your work and your personal and philanthropic interests.

For over 40 years, our team has worked with our clients to create, implement and maintain precisely tailored, comprehensive financial and investment strategies based on their life goals. Many of these relationships span decades, and more than a few of them span generations. We are honored to have earned their trust and friendship, and are completely committed to helping them reach their goals.

We look forward to learning more about you and your family, and discussing how we work to enhance the quality of your life.
Meet the Professionals

We are a tightly knit, multigenerational team of financial planners, portfolio managers and client service professionals. Combining our talents and experience with the vast resources of Morgan Stanley, we work to create and implement highly customized plans to help our clients reach their life goals. We act as go-to advisors on any financially related matter, providing the guidance and support needed to solve complex challenges and navigate major life transitions.
Keith T. Munera, CFP®
Managing Director
Financial Advisor

Drawing on over 15 years of experience in the financial services industry, Keith works closely with the team’s clients to create, implement and maintain highly customized wealth management plans. Keith’s primary concentrations include portfolio construction, risk management and the development and execution of retirement and financial planning strategies. Keith received a B.A. in economics and international relations from the University of Pennsylvania, and an MBA from the University of Pennsylvania’s Wharton School of Business.

John K. Wildemore III
Senior Vice President
Financial Advisor

John oversees investment portfolios for the team’s clients, tailoring each to address their specific needs and aspirations. John has over 45 years of experience as a hands-on investment manager, guiding his clients through multiple market cycles. His experience and perspective is invaluable to the team’s clients as they look to create long-term, multigenerational strategies to achieve their life goals and secure their legacies. John moved his practice to Morgan Stanley in 2012, after spending 43 years as a financial advisor at UBS and its predecessor companies. He received his B.S. in business administration from Bucknell University.
**Brett D. Caffrey**  
*Financial Advisor*

With over 10 years of financial and investment management experience, Brett works closely with the team’s clients to create, implement and monitor comprehensive financial plans based on their precise needs and goals. This includes a strong focus on developing customized allocation strategies. Brett graduated from Villanova University with a B.S. in finance.

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**Rebecca J. Alderfer**  
*Registered Client Service Associate*

With over 35 years of experience in the financial services industry, including 25 years as a member of the Wildemore Munera Group, Becky plays an instrumental role in creating an outstanding service experience for the team’s clients. Becky provides an extensive range of client and operations support, including communication, account opening and maintenance, and trade execution. Becky earned her B.A. in French from Dickinson College.
Jillian T. Sharkey
Client Service Associate

Drawing on over 10 years of experience in the financial services industry, Jillian plays a vital role in the Wildemore Munera Group’s daily operational and administrative functions. Jillian also serves as the team’s technology liaison and marketing coordinator, responsible for creatively implementing new ideas into the team website, brochures, and marketing materials. Jillian graduated from The University of Pittsburgh with a B.A. in Communications.
Our Services

- Wealth Management
- Financial Planning
- Retirement Planning
- Estate Planning Strategies
- Executive Financial Services
- Planning for Education Funding
- LGBT Planning Services
- Philanthropic Services
- Endowments and Foundations
- Lending Products
- Life Insurance
- Trust Services
- Municipal Bonds
- Fixed Income
Customized Planning for Major Life Transitions

• Sustaining your lifestyle in retirement

• Passing wealth to younger generations fairly, efficiently and harmoniously

• Selling/transitioning a family business

• Seeing your children through college

• Divorce or loss of a spouse

• Long-term care for your parents or yourself
Morgan Stanley strives to offer clients the finest in financial thinking, products and execution to help them meet their individual needs and achieve their personal financial goals. When we work together, you’ll benefit from personalized advice, objective guidance and dedication to your success as an investor. With access to Morgan Stanley’s renowned global resources and investment opportunities, we can help you develop and maintain an optimal investment strategy. Our wealth management strategy will address key areas of your financial life beyond traditional investments and may incorporate diverse recommendations for building and protecting your wealth.

This material does not provide individually tailored investment advice. It has been prepared without regard to the individual financial circumstances and objectives of persons who receive it. The strategies and or investments discussed in this material may not be suitable for all investors. Morgan Stanley Smith Barney LLC recommends that investors independently evaluate particular investments and strategies, and encourages investors to seek the advice of a Financial Advisor. The appropriateness of a particular investment or strategy will depend on an investor’s individual circumstances and objectives.