

Morgan Stanley

The New Albany Wealth Management Group at Morgan Stanley

Helping Meet the Specific Needs of Physicians

Our physician clients live complex and challenging lives that often include:



Extreme Time Pressure



Daily High-Stress Decisions



Substantial Tax Liabilities



A Specific Earning and Debt Profile



A Full and High-Energy Lifestyle

To serve these clients, The New Albany Wealth Management Group tailors our practice and services around the needs of physicians.

THE NEW ALBANY WEALTH MANAGEMENT GROUP AT MORGAN STANLEY

15 South High Street
New Albany, Ohio 43054

833-634-0189/TOLL FREE

Why Us?

Our deep and knowledgeable team combines comprehensive, highly measured wealth management with the opportunities of disruptive ideas and strategies.

For investors, disruptive ideas and technologies offer profound opportunities for exponential growth. At the same time, investors seek comprehensive wealth management so that every financial decision is aligned with their short-, medium- and long-term objectives. Our team serves both these needs, using our GO Strategy — Goal-based wealth management plus Opportunities for disruptive investing.

Meet Our Team



Lance White

Managing Director
Wealth Management
Wealth Advisor
Senior Portfolio Management Director

Lance works with our clients to uncover opportunities that help create meaningful growth.



Michael Platte, CRPS®

Senior Vice President | Wealth Advisor
Branch Manager | Corporate Retirement Director
Family Wealth Director
Financial Wellness Director
Portfolio Management Director

Mike focuses on the specialized needs of physicians and small-business owners.



Matt Penrod

Senior Vice President
Financial Advisor
Portfolio Management Director

Matt develops customized, goal-based investment strategies for clients and families.



Kathy Kahn, QPFC®

Financial Advisor
Financial Planning Specialist

Kathy engages in collaborative discussion to create a clear path for their clients' financial intentions.



Shane Moran

Vice President
Director of Investments

Shane handles due diligence and research, as well as portfolio and asset-allocation analysis.

How We Work: Our Principles

FIND WAYS TO HELP

No matter what your needs, we work to help you succeed.

BE HANDS-ON

We are responsive, accessible and deeply involved with our clients.

GET IN ON THE GROUND FLOOR

We seek investments we think can disrupt the status quo.

ZIG WHILE OTHERS ZAG

We look for opportunities that go against the grain.

MAKE CONNECTIONS IN EVERY FIELD

Our relationships extend across many fields.

BE PASSIONATE

We love the excitement of investing in something important.

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 Wealth Management 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.

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