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.

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