

The Olympic Group – Team Member Roles & Responsibilities

YOUR MORGAN STANLEY WEALTH MANAGEMENT TEAM



JERRY MEDVED, CPWA®, CEPA®

Managing Director
Family Wealth Director
Wealth Advisor
(206) 628-8863
jerry.c.medved@ms.com



TIFFANY SHIFFLETTE, CFA®

Senior Vice President
Financial Advisor
(206) 343-2780
tiffany.shifflette@ms.com



MEGAN KARL, CFP®

Vice President
Portfolio Management Director
Financial Advisor
(206) 344-5041
megan.karl@ms.com



JORDAN THAYER, CFP®

First Vice President
Portfolio Manager
Financial Advisor
(206) 628-4681
jordan.thayer@ms.com



NATALIE MEDVED

Registered Client Service Associate
(206) 628-4890
natalie.medved@ms.com



TORI FANNING, CFP®

Financial Planning Analyst
(206) 628-8866
tori.fanning@ms.com



MELISSA ULU

Senior Client Service Associate
(206) 344-3553
mel.ulu@ms.com



ALAN KHAITOV, CIMA®

Wealth Management Analyst
(206) 343-2900
alan.khaitov@ms.com

THE OLYMPIC GROUP AT MORGAN STANLEY

601 Union Street, Suite 5200
Seattle, WA 98101
(206) 628-4890
Website: [The Olympic Group](http://TheOlympicGroup)



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JERRY MEDVED, CPWA®, CEPA®

Managing Director
Family Wealth Director
Wealth Advisor
(206) 628-8863
jerry.c.medved@ms.com

- Advanced Planning
- Business Owner Focus
- Stock Plan Co-Lead
- International Client Advisor (ICA)
- Lending, Cash Management
- External Relationships

TIFFANY SHIFFLETTE, CFA®

Senior Vice President
Financial Advisor
(206) 343-2780
tiffany.shifflette@ms.com

- Chief Accountability Officer
- Alternative Investments
- Impact Investing
- Family Office Resources
- Investment Strategy

MEGAN KARL, CFP®

Vice President
Portfolio Management Director
Financial Advisor
(206) 344-5041
megan.karl@ms.com

- Retirement Plans
- Philanthropy
- College Planning
- Portfolio Alignment
- Risk Management/Insurance

JORDAN THAYER, CFP®

First Vice President
Portfolio Manager
Financial Advisor
(206) 628-4681
jordan.thayer@ms.com

- Stock Plan Co-Lead
- Business Owner Focus
- Equity Compensation
- Financial Planning
- Estate Planning Strategy

NATALIE MEDVED

Registered Client Service Associate
(206) 628-4890
natalie.medved@ms.com

- New Client Onboarding
- New Accounts
- Wires
- Client Review Prep

MELISSA ULU

Senior Client Service Associate
(206) 344-3553
mel.ulu@ms.com

- Client Account Service
- Cash Management
- Total Wealth View / Digital Vault
- Tax Reporting

TORI FANNING, CFP®

Financial Planning Analyst
(206) 628-8866
tori.fanning@ms.com

- Financial Planning Lead
- Asset Allocations
- Stock Option Analysis
- Cash Flow Analysis

ALAN KHAITOV, CIMA®

Wealth Management Analyst
(206) 343-2900
alan.khaitov@ms.com

- Alternative Investments
- Client Account Service
- Asset Allocations
- Stock Option Analysis

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