The Olympic Group – Team Member Roles & Responsibilities

YOUR MORGAN STANLEY WEALTH MANAGEMENT TEAM



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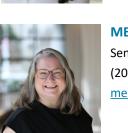
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- · Advanced Planning
- Business Owner Focus
- Stock Plan Co-Lead
- International Client Advisor (ICA)
- · Lending, Cash Management
- External Relationships

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

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

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- Equity Compensation
- Financial Planning
- Estate Planning Strategy

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

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- Cash Management
- Total Wealth View / Digital Vault
- Tax Reporting

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- Asset Allocations
- Stock Option Analysis
- Cash Flow Analysis

THE OLYMPIC GROUP AT MORGAN STANLEY

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