

The Olympic Group – Team Member Roles & Responsibilities

YOUR MORGAN STANLEY WEALTH MANAGEMENT TEAM

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THE OLYMPIC GROUP AT MORGAN STANLEY

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JERRY MEDVED, CPWA®, CEPA®

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

TIFFANY SHIFFLETTE, CFA®

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

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

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

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

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