The Olympic Group at Morgan Stanley



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- Advanced Planning
- Founder/Business Owner Focus
- Stock Plan Co-Lead
- International Client Advisor (ICA)
- Lending Specialist
- External Relationships
- **Industry Experience: 37 years**

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- Chief Accountability Officer
- Alternative Investments
- Impact Investing
- Family Office Resources
- Investment Strategy
- **Industry Experience: 26 years**

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- Retirement Plans
- Philanthropy
- Risk Management/Insurance
- Portfolio Alignment
- College Planning
- **Industry Experience: 22 years**

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- Stock Plan Co-Lead
- Business Owner Focus
- Equity Compensation
- Financial Planning
- Estate Planning Strategy
- **Industry Experience: 12 years**

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- Financial Planning Lead
- Stock Option Analysis
- Max Spend / Min Sale Price

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- Alternative Investments
- Client Account Service
- Asset Allocation

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- Cash Management
- Tax Reporting

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- Wires & Money Movements
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- New Accounts & New Client Onboarding
- Total Wealth / Digital Vault

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