Morgan Stanley

Wealth Management

Pictured (from left to right): Bethany Justen, Client Service Associate, Keri R. Burton, CFP®, CEPA®, Financial Advisor, Michael A. Pasqua, CFA, Financial Advisor, Nicole Scanlon, Financial Advisor.

The Pasqua Burton Scanlon Group at Morgan Stanley

February Newsletter

Welcome to the February 2025 Edition of our Newsletter!

As we move into the heart of the year, we're excited to continue supporting you on your financial journey. Whether you're planning for retirement, managing investments, or preparing for the unexpected, our team is here to provide insights and guidance that help you stay on track toward your goals. This month, we encourage you to review 2024 tax information via Morgan Stanley Online. If you are a part of mailing group one, your information is available now. Mailing group two and three will be available in the coming weeks.

As always, we're grateful for the confidence you place in us, and we look forward to serving you in the year ahead.

Here's to a prosperous February!

Market Outlook

February On The Markets

Read Here

What To Do With Bonus Money or Pay Raise

Have extra money coming in? Here are five ways additional income can help you achieve your financial goals.

Read More

5 Tax-Smart Steps to Help Build Wealth

Even small tax adjustments in your portfolio can yield significantly more wealth over time. As lawmakers debate the tax code, here are several strategies to consider.

Learn More

Are You Prepared For Tax Day?

The countdown to Tax Day has begun. Here are some strategies to consider as the deadline approaches.

Learn More

Easily Access Tax Forms Online

For easy and secure online access to your tax forms, please follow these steps:

1. Log into your account via Morgan Stanley Online
2. Click the Accounts tab
3. Select the Documents tab
4. Go to the Statement drop-down tab
5. Select Tax Documents and download them

Review the estimated schedule for receiving your tax forms here.

If you are enrolled in eDelivery, you will receive a notification when your tax forms become available. If you are not enrolled in eDelivery, consider enrolling today for greater convenience.

You can reference our 2024 and 2025 tax tables for help with filing taxes and for future tax planning.

Learn how we can integrate tax-efficient strategies into your investment plan with Tax Management Services.

For specific queries about your tax returns, please reach out to your personal tax advisor.

Stay Connected with Morgan Stanley Online!

Helping you find ways to manage your account is important to us. Morgan Stanley Online provides you with the flexibility you need to take care of your finances and investments virtually anywhere.

Check out the link below to learn about the ways our digital capabilities can help you.

Log In

Please feel free to reach out to our team if you have any questions or require assistance. We are here to support you every step of the way.

Morgan Stanley Wealth Management
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