

7 Things Your Clients Might Be Worried About

One of our objectives is to serve as a value-added resource to you and, indirectly, to your clients. From a financial planning perspective, and depending upon their personal and family situation, here are 7 things your clients should consider:

1

How do I
minimize income tax
or capital gains tax?

2

What impact
will wealth have
on my heirs?

3

What strategies
can I take to protect
my assets?

4

If we have a special-needs
family member, how should
we plan financially?

5

What are my expense
and cash flow needs?

6

Am I
taking
advantage of
tax-efficient
charitable
giving
strategies?

7

Can I make work optional and retire comfortably?

For answers to these questions or for a complimentary second opinion about your financial plan or investments, please contact Raju Pathak, Financial Advisor, Managing Director—Wealth Management at The Pathak Group.

Phone: (617) 589-3373

Email: Raju.Pathak@morganstanley.com

Visit: www.morganstanley.com/pathakgroup

Morgan Stanley, 28 State Street, 35th Floor, Boston, MA 02109

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