The Pathak Group at Morgan Stanley

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