

Morgan Stanley

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The Pathak Group at Morgan Stanley

Raj Pathak Selected to Participate in Morgan Stanley Chairman's Club Event

Boston, MA (May 2025) – The Pathak Group at Morgan Stanley's 28 State Street office in Boston recently announced that Raj Pathak, Managing Director, Global Sports & Entertainment Director, and Senior Portfolio Management Director, was once again invited to the Morgan Stanley Chairman's Club Conference.

Attendees included top advisors from the firm, who were invited to join Morgan Stanley's senior management team for the two-day event in Nashville, Tennessee.

Programming began with a strategy update from **Jed Finn**, Head of Wealth Management and insights on AI from **Sal Cucchiara**, Chief Information Officer of Wealth Management. Additional sessions included a market update, a U.S. banks update, strategies for optimizing practice management, and an insightful fireside chat with Chairman and CEO **Ted Pick**.

"I'm honored to have been selected to participate again this year," **Raj Pathak** said. "The presentations were highly informative, and the event was also a great opportunity for connecting with company leaders and comparing notes with other top advisors. Ultimately, it helps us refine our practice model and provide better advice and perspective to our clients."

Raj Pathak has been with Morgan Stanley for over twenty-five years and now serves a limited number of clients who have entrusted him with over \$2.3 billion in assets as of December 2024. He uses a consultative process to gain a detailed understanding of clients' deepest values and goals, and provides customized recommendations designed to address each client's unique needs and goals beyond simply investments. For more information, please contact the Pathak Group at (617) 589-3373 or visit www.morganstanleyfa.com/pathakgroup.