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Morgan Stanley

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The Pathak Group at Morgan Stanley

Pathak Group Meets with Leaders at Morgan Stanley Home Office

Boston, MA (February 2025) – The Pathak Group at Morgan Stanley’s 28 State Street office in Boston announced that the team recently traveled to the company’s headquarters in New York City.

The purpose of the visit was to further develop personal connections with company leadership while gathering greater insights and updates on a wide range of topics, such as market research and strategy, data security, client engagement, and generative AI solutions.

“The trip was a great opportunity to reconnect with home office contacts and build relationships with firm leadership,” **Raj Pathak**, Managing Director of the Pathak Group said.

“It also enabled us to present our perspectives based on day-to-day interaction with investors. The information exchanged will help us share the latest thinking on key issues with clients.”

Raj Pathak, Managing Director Wealth Management, 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.

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