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Morgan Stanley

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## The Pathak Group at Morgan Stanley

# Pathak Group Meets with Leaders at Morgan Stanley Headquarters

**Boston, MA (March 2024)** – 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 build or further personal connections with company leadership while gathering greater insights and strategy updates on a range of topics, such as capital markets, client engagement, and philanthropic giving.

“The trip was a great opportunity to build relationships with and learn directly from firm leadership,” **Raj Pathak**, Managing Director of the Pathak Group said.

“The perspectives and knowledge they shared will help us present the latest thinking on key issues when interacting with our 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 \$1.9 billion in assets as of December 2023. 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](http://www.morganstanleyfa.com/pathakgroup).

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