

The Pathak Group at Morgan Stanley

Raj Pathak Selected as Speaker at Morgan Stanley Business Development Intensive

Boston, MA (October 2024) – The Pathak Group at Morgan Stanley’s 28 State Street office in Boston recently announced that Raj Pathak, Managing Director Wealth Management, was selected to speak at a recent Business Development Intensive conducted by Morgan Stanley.

Approximately 300 Morgan Stanley advisors with tenure levels averaging in the three-to-seven-year range attended the event, which focused on best practices for early career business development. The session was led by **David Richman**, Managing Director of Eaton Vance Distributors, Inc., part of Morgan Stanley Investment Management (MSIM). David has been a student of the financial advisory experience for the better part of four decades and is a highly sought-after speaker.

Mr. Pathak provided first-hand input for the audience, sharing examples of how he built his practice and developed productive relationships with his professional network.

“I’m honored to have been selected to join David for this program,” he said. “The early years can be challenging for an advisor and it’s important to build a client base *and* to develop relationships with other professionals in the marketplace.”

Financial Advisor Raj Pathak has been with Morgan Stanley for over 25 years and now serves a limited number of clients who have entrusted him with more than \$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 individualized needs and goals beyond simply investments. For more information, please contact the Pathak Group at (617) 589- 3373 or visit the group’s website at www.morganstanleyfa.com/pathakgroup.

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