

The Pathak Group at Morgan Stanley

Raj Pathak Attends Morgan Stanley Global Sports & Entertainment Director's Summit

Boston, MA (December 2024) – The Pathak Group at Morgan Stanley's 28 State Street office in Boston recently announced that Raj Pathak, Managing Director Wealth Management and Global Sports & Entertainment Director attended a summit orchestrated by Morgan Stanley's Global Sports & Entertainment division, which was created to help address the unique wealth management needs of athletes, coaches, owners, directors, producers, writers, actors and their business advisors.

The two-day summit was designed to provide the attending Directors with the latest information about the firm's customized resources, programs and strategies encompassing, asset and liability management, philanthropic and lifestyle advisory services, family governance and financial planning, insurance, investment banking services and private equity. Additional presentations and panel discussions covered a wide range of supporting topics, such as the evolving sports team ownership landscape, the intersection between sports and entertainment, and athlete brand protection strategies.

"This program was very informative," said **Raj Pathak**. "It's important to stay abreast of the nuances associated with the firm's specialized resources, which we can leverage to provide wealth management services that are tailored to each client's individual situational needs and goals. The presenters and panel members did an exceptional job at sharing relevant information and keeping participants engaged throughout the summit."

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 \$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 the group's website at www.morganstanleyfa.com/pathakgroup.

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