

# Raj Pathak Participates in Morgan Stanley Peer Sharing Event

Our team, the *Pathak Group at Morgan Stanley*, was recently highlighted in a peer sharing discussion on teaming and partnering hosted by Morgan Stanley's Practice Management Team.

Successful Boston-based teams who are actively expanding and evolving their practices were featured during the session. **Raj Pathak**, Managing Director, Global Sports & Entertainment Director, Senior Portfolio Management Director, Financial Advisor at the Pathak Group, represented our team.

"This was a great opportunity for solo practitioners at the firm to learn from peers, ask questions, and explore how teaming might support the future growth of their business," he said.

"Teaming is often a highly effective way of leveraging the strengths of many while taking advantage of various practice-management economies-of-scale. The goal is to build a team that can provide comprehensive financial advice and planning as well as high levels of responsive client service."

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](http://www.morganstanleyfa.com/pathakgroup).