

The Pathak Group at Morgan Stanley

Raj Pathak Selected as Featured Speaker at Morgan Stanley Evolution of the Private Bank Event

Boston, MA (September 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 as a featured speaker for one of Morgan Stanley’s private bank event series.

Delivered via Zoom, the event was hosted by senior Morgan Stanley management. The discussion focused on how advisory teams can partner with the Private Bank and provided insights into the wide range of lending solutions available to clients and how upcoming enhancements have been designed to further enhance client experiences and connectivity.

“I’m honored to have been selected to present,” **Raj Pathak** said. “The resources offered by the Private Bank can really help an advisor deliver services that often go above and beyond client expectations. It’s important for us to help clients maintain an awareness that these services are available so they can make us their first phone call when unexpected situations arise.”

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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