

Morgan Stanley

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The Pathak Group at Morgan Stanley

Raj Pathak Participates in Regional Peer Sharing Program

Boston, MA (January 2025) – 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 participated in a regional peer sharing event organized by the firm.

The facilitated program was designed to provide advisors with a forum for exchanging ideas and sharing their experiences, success stories, and best practices for executing key processes such as practice management, client service, and business development.

“This event was well organized and very useful,” said **Raj Pathak**. “It’s nice to share information and compare practices with other advisors at the firm who might have taken a different or innovative approach to managing their team or servicing clients. Attendance was good and the information exchanged will be helpful as we finalize our practice management plans for 2025.”

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 the group’s website at www.morganstanleyfa.com/pathakgroup.

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