

Morgan Stanley

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The Pathak Group at Morgan Stanley

Raj Pathak Serves as Guest Speaker at Morgan Stanley Focus 100 Program

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 was a guest speaker at a Focus 100 Program session orchestrated by the firm.

The Focus 100 Program provides a platform for teams and sole practitioners at Morgan Stanley to identify teaming and partnering opportunities across the region. It has been designed to help sole practitioners identify teams they might join to provide business continuity to their clients and a scalable practice that accommodates their clients’ expanding and complex needs. The program also helps existing teams identify advisors to join their team to increase their client base, add an additional skill set to the practice, manage and elevate current and new business activity, or deliver additional products and services to their existing clients.

“I appreciated being invited to speak at the session,” said **Raj Pathak**. “It’s nice to share information and best practices with other advisors at the firm who might benefit from joining a team like ours or who might take away some ideas for improving their practice model.”

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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