

The Pathak Group at Morgan Stanley

Virtual
Family
Office
Services

- Cash Flow / Expense Analysis
- Travel & Concierge Services
- Private Health Advisory Pinnacle Care
- Life and Long Term Care Insurance Policy Review
- Online Bill Pay Services
- Health, Wellness & Longevity Planning

Wealth
Manager

- Financial Planning
- Strategic Estate Planning
- Trust Services
- Insurance Solutions
- Cash Management & Lending
- Philanthropy Management

Financial
Advisor

- Strategic Asset Allocation
- Tactical Asset Allocation
- Manager Selection
- Portfolio Construction

Broker /
Investment
Advisor

- Technical Insights
- Trading & Execution
- Results in a Single Area

Unqualified Advice

Raju Pathak Insurance # 1013573, Brendan Doyle Insurance # 11109407

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Guarantees and contractual obligations are backed by the claims-paying ability of the issuing insurance company.