

The Plaza Group at Morgan Stanley

Teri Salach

Financial Advisor, CIMA®, CWS®

Sheila K. Davis

Financial Advisor, CFP®

Jennifer Denning

Financial Advisor

tel:(913)402-5264



Highlighting Applications Designed To Streamline Financial Life

[Client Preferred Name]

When it comes to making your financial world as streamlined and accessible as possible, it is vital to stay up to date with the technology available.

Our team has provided information and links below that you may find applicable for understanding your financial picture.

[Schedule a Meeting](#)

[Visit Our Website](#)



Morgan Stanley Online: Financial Flexibility and Management

Morgan Stanley Online (MSO) is your portal to your financial picture. Over the years it has evolved to include many different applications that you may not utilize or even know about.

Ways MSO can help you securely manage your financial picture:

- Access to key information such as account balances, financial statements, tax documents, etc.
- The ability to initiate electronic transfers and bill pay
- Access to financial tools such as a budget planner and a home loan estimator

[Click Here to Learn More](#)

MSO Mobile App

Including all the standard features of MSO, the MSO Mobile App allows you to deposit checks from virtually anywhere with some of the industry's highest deposit limits.

Download MSO Mobile Below:



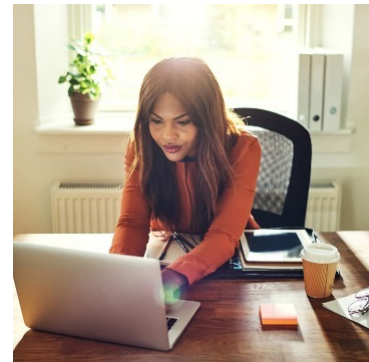
Modern Wealth Tools: Your Complete Financial Picture (Housed within MSO)

Morgan Stanley's wealth management tool allows you to link and view all of your financial accounts, including external accounts, within MSO.

For example:

- Checking and savings accounts
- Credit card balances
- Retirement plans (401(k), IRA, etc.)
- Select investment accounts

This allows us, as financial advisors, to see our clients' financial picture and provide you with the best possible advice.



[Click Here To Learn More](#)

Digital Vault: Securely Store and Share Financial Documents (Housed within MSO)

As our lives become more and more integrated with technology, a modern concern begins to arise; Cybersecurity.



Morgan Stanley offers a document collaboration and secure storage tool called Digital Vault. With this tool, clients are able to **securely locate, store, and send** vital documents within MSO such as:

- Signed and notarized documentation
- Durable Power of Attorney
- Estate documents such as your Will, deed, or trust
- Even a copy of your passport!

Secure your vital documents within the Digital Vault today to reduce cyber-risk and help ensure that they are in good hands.*

[Click Here to Learn More](#)

[Signature of Primary Contact]

NOTICE: Morgan Stanley is not acting as a municipal advisor and the opinions or views contained herein are not intended to be, and do not constitute, advice within the meaning of Section 975 of the Dodd-Frank Wall Street Reform and Consumer Protection Act. If you have received this communication in error, please destroy all electronic and paper copies and notify the sender immediately. Mistransmission is not intended to waive confidentiality or privilege. Morgan Stanley reserves the right, to the extent permitted under applicable law, to monitor electronic communications. This message is subject to terms available at the following <https://www.morganstanley.com/disclaimers>. If you cannot access these links, please notify us by reply message and we will send the contents to you. By communicating with Morgan Stanley you acknowledge that you have read, understand and consent, (where applicable), to the foregoing and the Morgan Stanley General Disclaimers.

Please see our [Privacy Pledge](#) for details about how Morgan Stanley handles personal information.

If you would like to update your email preferences or unsubscribe from marketing emails from Morgan Stanley Wealth Management, you may do so [here](#). Please note, you will still receive service emails from Morgan Stanley Wealth Management.

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

The Morgan Stanley Mobile App is currently available for iPhone® and iPad® from the App StoreSM and AndroidTM on Google PlayTM. Standard messaging and data rates from your provider may apply.

Not all documents can be accepted into Digital Vault*

Not all products and services may be available to persons living outside of the United States.

Morgan Stanley Wealth Management
2000 Westchester Avenue, Purchase, NY 10577-2530 USA

©2022 Morgan Stanley Smith Barney LLC. Member SIPC.

[System will insert CRC number here]