

# You're Invited to The PCG Update 2/21 Lifestyle Management Reimagined: Health, Wellness, and Concierge Support

Featuring Valerie Wong Fountain and Dr. Kim Henderson

Join us for another edition of The PCG Update on **Friday, February 21 at 1 PM EST** as we explore Morgan Stanley's Lifestyle Management Services. This session will feature two special guests, Valerie Wong Fountain, Head of Family Office Resources Platform & Partner Management and Dr. Kim Henderson, Head of Wealth Management Health and Wellness Education, who will provide insights into the customized solutions available to our clients. Topics will include travel and concierge support, tangible asset management, mental wellness, alternative living for seniors, among a multitude of others. We'll highlight real life case studies and signature events planned for 2025. Discover how Morgan Stanley's Lifestyle Management services can help you and your family elevate your well-being and achieve peace of mind.

## DATE & TIME

Friday, Feb. 21st  
1:00-2:00 EST

## Location

Zoom Webinar  
Conference  
Passcode:  
900376

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As a reminder, while participants will not be able to see fellow attendees or their names, everyone can ask questions live for an interactive experience.

## Speaker Biographies

Valerie Wong Fountain is a Managing Director at Morgan Stanley, and she is based in the Firm's New York office. Valerie serves as Head of Family Office Resources Platform & Partner Management, which includes responsibility for Trust Services, Signature Access and Single Family Office Advisory.



**Valerie Wong Fountain**

Managing Director,  
Morgan Stanley

Prior to her current role, Valerie served as Co-Head of Private Capital Markets, a dedicated platform within the Global Capital Markets division of the Institutional Securities Group that is focused on raising capital for corporations in private market transactions. Valerie partnered closely with the Investment Banking Division to advise companies across multiple sectors on all matters related to their private funding goals. She also managed the private syndicate, connecting institutional pools of capital with high-quality issuers on a global basis.

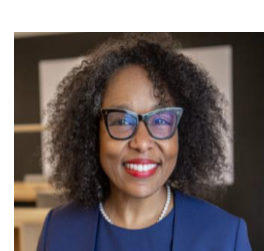
Previously, she served as Chief of Staff to James Gorman, Morgan Stanley's Chairman and Chief Executive Officer. She was responsible for managing the Office of the Chairman and CEO and broader Firm management staff; liaising with senior executives, coverage officers, and clients on behalf of the Chairman and CEO; driving key strategic projects and initiatives; and covering key clients across geographies as a firm relationship manager.

She started her career in the Institutional Equity Division, where she traded a range of Delta One products including Exchange-Traded Products, Index and Custom Basket Total Return Equity Swaps, Futures, and Program Baskets.

Valerie serves on the First Tee of Metropolitan New York Executive Committee and Board of Directors, Morgan Stanley Foundation Board of Trustees, the Penn Golf Alumni Board, and the Association of Asian American Investment Managers National Advisory Council. She also serves as the Executive Sponsor for the Asian Leaders Forum in Morgan Stanley Wealth Management. In addition, she completed a two-year term as Morgan Stanley's Corporate Leader for the Council on Foreign Relations.

Valerie earned a Bachelor of Science in Economics from the Wharton School at the University of Pennsylvania, graduating summa cum laude and as a University and Joseph Wharton Scholar. She was also a Division I athlete, competing as a three-year letterwinner on the Women's Varsity Golf Team. As an amateur golfer, she won the Women's Metropolitan Golf Association Better Ball Championship in 2019 and 2018. Valerie recently received the Ascend A-List award. In 2023, she was named a MAKER by Morgan Stanley Wealth Management in recognition of her work as a driver and champion of women's achievements. In 2022, Valerie was presented with Asia Society's APA Driver for Diversity Award. In 2021, Valerie received the Trailblazer Award from Ascend. In 2020, Valerie was honored as one of the top 100 Most Impactful Asians (A100) in culture by Gold House. In 2014, she was recognized as one of the top 50 Outstanding Asian Americans in Business by the Asian American Business Development Center and was awarded Most Influential APIA New Yorker by the National Association of Asian American Professionals New York. Valerie also holds the Chartered Financial Analyst designation. She is Series 3, Series 7, Series 24, Series 55, Series 63, and Series 79 licensed.

Dr. Kimberly Henderson is a Managing Director and recently joined Family Office Resources as the Head of Wealth Management Health and Wellness Education. In this role, she highlights opportunities for clients to consider healthy choices, spearheads thought leadership on healthcare issues facing ultra high net worth clients, shares best wellness practices and discusses the impact of health and medical developments with clients and their families.



**Dr. Kimberly Henderson**

Managing Director,  
Morgan Stanley

Dr. Henderson joined Morgan Stanley two years ago during the height of the COVID-19 pandemic as the Associate Medical Director and provided direct oversight and coordination of global medical, health and wellness services. In addition to helping keep her colleagues safe and informed during the pandemic, Dr. Henderson became Morgan Stanley's subject matter expert on multiple health and wellness related topics including Covid, women's health, health equity, resiliency, sleep, wellbeing, and adolescent and family mental health.

In the spirit of Morgan Stanley's commitment to giving back, Dr. Henderson is an active supporter of communities of color. She received the honor of being appointed an executive sponsor for the inaugural Morgan Stanley HBCU Scholars Program, which awards a four-year college scholarship and ongoing academic support to underprivileged youth.

Recognizing the negative impact the pandemic had on children's mental health, Dr. Henderson has dedicated her time for two years to judge the Morgan Stanley Innovation Awards program, which provides a \$100,000 grant and business training to start-ups focused on child and adolescent mental health.

Prior to joining Morgan Stanley, Dr. Henderson was the Senior Medical Director at CVS Health, where she spent 14 years supporting enterprise-side initiatives, pharmacy benefit management sales strategies and retail health programs including oversight of Minute Clinic nurse practitioners.

Dr. Henderson enjoyed an 18-year career practicing medicine and is an attending emergency medicine physician at Mount Sinai Beth Israel Medical Center. She earned her medical doctorate and juris doctorate from Georgetown University in Washington DC.

Dr. Henderson lives in lower Manhattan with her husband, her sons and their five-year-old Rhodesian Ridgeback, Hildy. Dr. Henderson completed two half marathons in 2022 and looks forward to starting her day with a boxing work out or a round of cardio tennis.

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