

Morgan Stanley

October 6, 2021

## Erik Pulley Receives Family Wealth Director Designation

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Oakland, CA -- Morgan Stanley announced today that Erik Pulley, a Financial Advisor in the Firm's Wealth Management office in Oakland has earned Morgan Stanley's Family Wealth Director (FWD) designation.

"This is an exceptional achievement for Erik Pulley and an attestation of his commitment to today's high net worth families. Erik Pulley has demonstrated a sophisticated approach to the management of significant wealth that helps to set him apart from others within the industry," said George Shick, Complex Manager.

Designated Family Wealth Directors must demonstrate professional knowledge and experience in a range of wealth management solutions including estate planning strategies, alternative investments, control and restricted securities, lending, hedging and monetization, and business succession planning.

The FWD designation also entitles Erik Pulley to specialized access to a variety of family advisory services including, family governance and wealth education, philanthropy management and lifestyle advisory.

Erik Pulley has been a member of the financial services industry for 23 years. As a Financial Advisor with Morgan Stanley, he offers a full suite of financial planning and investment services to individual clients, institutions, foundations and endowments.

Erik Pulley holds a Bachelor of Science Degree from The University of Arizona, and is a member of the Firm's President's Club.

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory

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services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

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