

# The Red Cardinal Group at Morgan Stanley



## From Our Team

With Spring in full bloom, we have a few updates we would like to share. Please feel free to reach out to us if you would like to discuss any of our Spring Updates.



## 2025 Forbes | SHOOK Best-in-State



Forbes has just published its annual ranking of Best-In-State Wealth Advisors and we are proud to share that Executive Director, Joseph Radzwill has been named to the 2025 list for the 4th consecutive year.

This accolade is a reflection of Joe's enduring commitment to you, our clients, by delivering exceptional service, personalized attention, and tailored solutions. Congratulations Joe!

Learn more about Joe and The Red Cardinal Group's Wealth Management insights and services by watching a short [video](#).

*2025 Forbes Best-In-State Wealth Advisors*  
*Source: Forbes.com (Awarded 2021-2025). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.*  
[Awards Disclaimer](#)

Forbes List



## 5 Ways to Spring Clean Your Finances

The new spring season offers a great opportunity to refresh your home. While you're cleaning and decluttering, you may also want to take some time to tidy up your finances. Read this article to learn [five strategies to spring clean your financial house](#).



## Fun Spring Recipes

Try these classics with a seasonal twist using fresh ingredients. Let us know what you tried.

Read More

## Team Updates



Senior members represented The Red Cardinal Group the Forbes Shook Top Teams Conference in Miami Beach. This annual event is an opportunity to peer share with colleagues across the financial services industry and listen to top thought-leaders and economists from around the country.



Congratulations are in order for Client Service Associate, Dean Fletcher on passing his Series 7 and 66 exams to obtain these respective securities financial licenses. This milestone not only reflects his hard work and dedication, but also his commitment to growing as a financial professional.

## National Literacy Month

April is Financial Literacy Month – a perfect time for old school wisdom, with a passion for what's possible.

That is why we offer, family-friendly tool, [Morgan Stanley Financially Fit](#), to help provide a foundation of knowledge that can lead to confident decision-making about money.

Please let us know if you'd like to discuss or learn more about the topics referenced above.

[Signature of Primary Contact]

Picture From Left to Right: Dean Fletcher (Client Service Associate), Marci Moss, CFP® (Portfolio Associate), Joseph Radzwill, CFP®, CPM® (Executive Director, Financial Advisor), Stefania Burciu Melgar (Client Service Associate), Sue Ayccock, CRPS® (Business Development Associate), Andrew Pisechko, CFP® (Financial Advisor)

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