



YOU'RE INVITED

Direct Indexing - A Tax Advantaged Investment Strategy

Learn how Direct Indexing may improve your capital gains tax situation, while still participating in the market.

Event Information

Date: September 27th, 2023
Time: 6:00pm-8:00pm EDT

Refreshments will be provided.

Location: Cooper's Hawk Winery and Restaurant
19870 Belmont Chase Dr. Ashburn, VA 20147

Hosted By:

The Renaissance Group

Morgan Stanley
11951 Freedom Drive
Suite 1200
Reston, VA 20190

Speakers:

Shanika McCloud, Financial Planning Specialist, Financial Advisor
Morgan Stanley

Paul Luebbe, Associate Vice President, Senior Portfolio Manager, Wealth Advisor
Morgan Stanley

Stephen Lollis, Regional Director
Goldman Sachs

RSVP Details

Space is limited. To RSVP, please contact Shanika McCloud or Paul Luebbe at:

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