



[Client Preferred Name]

Welcome to our September newsletter! As summer comes to a close, it's a great time to start considering your fall finances. In this edition, we've included several resources to help you finish 2025 on a strong note.

We're also excited to share some team news: Paxton Blanchard has joined us as a Financial Advisor and Financial Planning Specialist, and Alexandra Costanzo has joined as our Client Service Associate. We're thrilled to welcome them both and know they'll be wonderful resources for you.

Finally, we're wishing all students heading back to school a successful and rewarding year ahead. As always, if you'd like to discuss any of the topics in this newsletter further or simply check in, please don't hesitate to reach out.

Team Updates

Paxton Blanchard



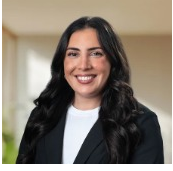
Financial Advisor and Financial Planning Specialist

Paxton Blanchard is a Financial Advisor with the Riverstone Group at Morgan Stanley, joining in 2025. He offers personalized wealth management by understanding clients' needs and crafting tailored financial strategies. Paxton utilizes Morgan Stanley's digital tools to enhance client experiences and align strategies with financial goals. Previously, he was a Safety Manager on major Massachusetts construction projects, bringing discipline and leadership skills to his financial management approach. He holds Series 7 and 66 licenses and collaborates with Gary Scheid and his father, Peter Blanchard. Outside of work, Paxton enjoys outdoor activities like boating and skiing.

Alexandra Costanzo

Client Service Associate

Allex Costanzo is a Client Service Associate with The Riverstone Group at Morgan Stanley, joining in 2025. With over six years in financial services, including roles at TD Bank and Windsor Private Wealth, she provides reliable client support and account management. A University of New Hampshire graduate, Alexandra is known for her client-first approach and attention to detail. Outside work, she enjoys family time in Gloucester, traveling, cooking, and walking her dog, Finn.



Client Resources

Morgan Stanley: On The Markets

Dive into the latest edition of "On the Markets" by Morgan Stanley Wealth Management.

[Learn More](#)

CYBERSECURITY CENTER

Check out our collection of practical takeaways and best practices from our cybersecurity professionals, then explore a few of the ways we can help protect you.

[Learn More](#)

Client Insights



Morgan Stanley Education Planning Center

With education costs rising, paying for college has become a major life expense that requires smart planning. Find answers to key questions here.

[Learn More](#)

How to Live Your Best Life as You Age

Dr. Kim Henderson from Morgan Stanley discusses how health, balance and purpose can help you thrive in your older years.

[Learn More](#)

The Riverstone Group

Visit our website to further explore insights, tools and our suite of services.

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