

THE ROCKPORT GROUP AT MORGAN STANLEY

NEWSLETTER

LOOKING BACK ON 2025

As we look back at the past year, it's amazing to see how much has happened. We started the year looking forward to what was ahead. Some of us celebrated special moments, like birthdays, graduations, and trips. There were also exciting events, that brought us together to celebrate. Overall, this year was a mix of joy and hard work, but it helped us grow and appreciate the little things in life.



L-R Evelyn Guidry, Michael Farah, Pat Johnson, Bill Wilson

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VOLUNTEERING

WHERE THE HEART MEETS HAND



June marks Global Volunteer Month, the longstanding tradition of volunteering and giving back. Each year this program brings us all together to act on our shared commitment to support our communities by volunteering and reaffirming one of our core values, Give Back.

Morgan Stanley has provided 3.1 million hours of employee volunteering since the first Global Volunteer Month in 2006.

The Rockport and Corpus Christi teams volunteered at the local Coastal Bend Food Bank for the third year in a row. We gathered to help with various tasks throughout the morning. The atmosphere was filled with a sense of teamwork and purpose. Everyone worked hard and supported each other making the tasks easier and more enjoyable. By the end of the morning, we felt fulfilled knowing we had made a positive impact on our community. In addition to volunteering, we presented a check on behalf of the Morgan Stanley Foundation in the amount of \$32,052.





Spooky Season **AT THE OFFICE**



Spooky season can be a lot of fun! As Halloween approaches many workplaces start to decorate and celebrate this exciting time of year. You might see witch hats hanging from the ceiling, pumpkins on desks, and even some spooky lights. It's a great way to make the office feel festive and bring some joy to the workday.



Morgan Stanley

Morgan Stanley is proud to congratulate

The Rockport Group

Named one of Forbes' Best-In-State Wealth Management Teams

Being named to Forbes' 2026 Best-In-State Wealth Management Teams list is a testament to your experience, focus, and dedication to your clients' financial future.

Thank you for the work you do each day and for carrying forward the standard of excellence at our firm.

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Source: Forbes.com (Awarded January 2026) 2026 Forbes Best-In-State Wealth Management Teams. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period from 3/31/24-3/31/25. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

Holiday SPIRIT



Some of the best parts of the holiday season are the decorations, food, and gatherings. Homes, streets, and businesses, are filled with lights, decorations, and festive displays. Many make delicious meals and treats. The holiday spirit creates a magical atmosphere that brings smiles to faces, and warmth to the heart.



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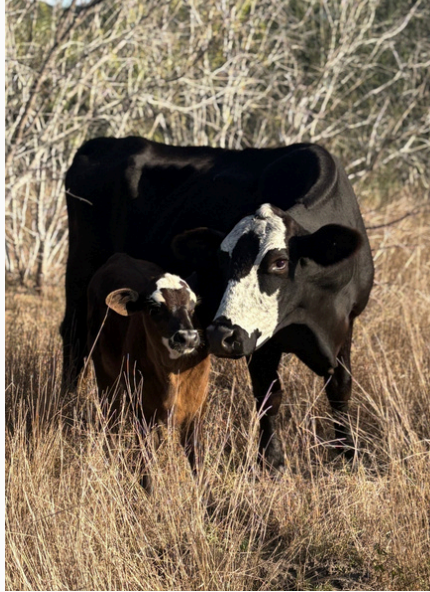
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