



Dear Valued Clients and Friends,

As we step into March, our focus this month is on giving back—a core value that drives everything we do. Whether it's supporting our communities, mentoring the next generation, or helping clients navigate their financial futures, we believe in making an impact and leaving our world a better place.

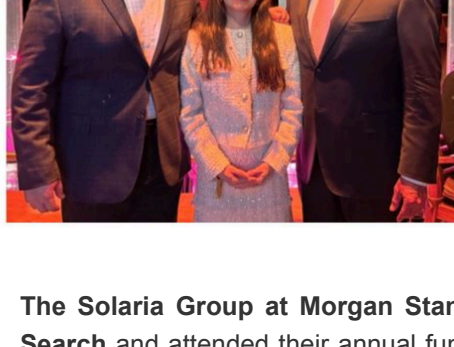
In this issue we share how we are giving back and tools you may use to give back too!

Ross and Solaria

[Schedule a Meeting Here](#)

March Focus: Giving Back

The Solaria Group at The Summer Search Gala



The Solaria Group at Morgan Stanley had the opportunity to be a sponsor for Summer Search and attended their annual fundraising celebration, honoring 35 years of service. The organization is dedicated to empowering young people through mentorship, experiential learning, and long-term support. Summer Search is a national nonprofit that helps students from low-income backgrounds develop the confidence, resilience, and skills needed to succeed in school, work, and life. This sponsorship reflects one of Morgan Stanley's core values—giving back—by investing in the next generation and supporting opportunities that create a lasting impact.

Pictured above are Philip Horowitz, Financial Advisor; Solaria Perez-Stepanov, Financial Advisor; and Ross Pearlman, Financial Advisor.



Charitable Gifting

Gifts to charitable organizations may result in income, gift, and/or estate tax charitable deductions.

[Learn More](#)



Donor Advised Funds

Donor advised funds are one of the easiest and most tax-advantaged ways to give to charity. Click the below link to learn more about how this can be done with Morgan Stanley.

[Learn More](#)

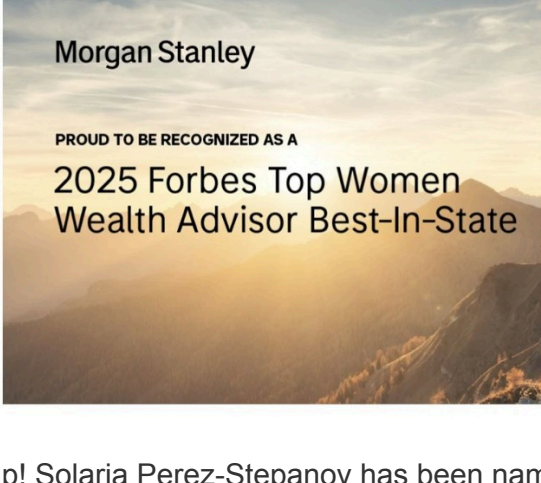
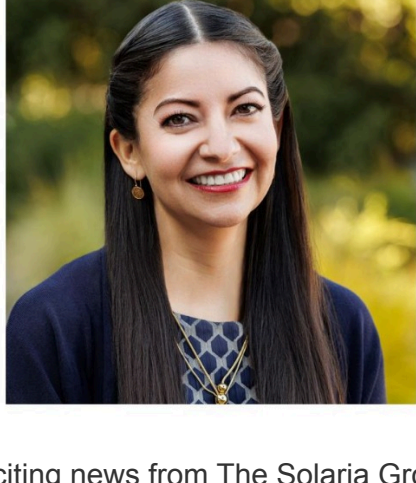


Annual Gifting to Family Members

When gifting to family members, it's important to carefully consider which type of assets you give and the tax implications of doing so.

[Learn More](#)

From Our Team



Exciting news from The Solaria Group! Solaria Perez-Stepanov has been named to the Forbes 2025 Best-in-State Top Women Wealth Advisors ranking.

Congratulations Solaria! You continue to redefine industry standards for success.

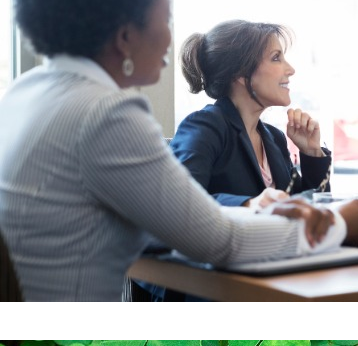
[Source: Forbes (Awarded Feb 2025). Data compiled by SHOOK Research LLC based for the period 9/30/23–9/30/24. <https://www.morganstanley.com/what-we-do/wealth-management/forbes-top-wealth-advisors-lists-2025>, <https://www.morganstanley.com/disclosures/awards-disclosure.html>]

More Photos from the Gala



Photo above from left to right: **Phil Horowitz**, Financial Advisor, **Dorthy Glusker**, Adolfo Diaz, Client Service Associate, **Solaria Perez-Stepanov**, Financial Advisor, **Amy Corben**, **Ross Pearlman**, Financial Advisor

March Calendar



March 8 - International Women's Day

At The Solaria Group, we are committed to empowering women and celebrating their achievements. This International Women's Day, we reaffirm our dedication to fostering growth, leadership, and opportunity.

Ask about our Women in Leadership Portfolio.



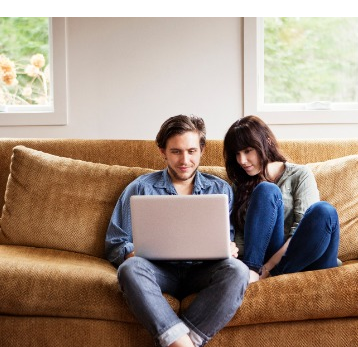
March 17 - St. Patrick's Day

Wishing you the luck of the Irish! Whether you're celebrating with friends or enjoying a touch of green, may your day be filled with good fortune.



March 20 - First Day of Spring

Spring is here! Time to welcome warmer days, fresh beginnings, and the renewal of the season..



April 7- Wealth Education for the Next Generation Webinar

Topic: Tying The Financial Knot: Navigating Joint Finances & Communications

Webinar Date and Time

Monday, April 7th, 2025
1:00 p.m. – 2:00 p.m. PT / 4:00 p.m. - 5:00 p.m. ET

[Register Here](#)

Monthly Quote

Someone is sitting in the shade today because someone planted a tree a long time ago - Warren Buffett



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