

Please Join Us for a Seminar on

## The After-Tax Advisor - It's what you keep that counts: Direct Indexing

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Did you know Tax Aware investing may potentially increase your annual returns depending on your specific portfolios and approaches?

As technology and the economic landscape change, new investment opportunities emerge. Join us to learn how Morgan Stanley's Platform of tax advantaged strategies and access to institutional investment resources can potentially help you improve your portfolio's tax efficient returns.

**Date:** October 2nd 2025

**Time:** 6:30PM

**Place:** King Ranch Texas Kitchen

1605 Post Oak Blvd  
Houston, Texas 77056

**Dinner and Drinks  
Will be Served**

Limited Seating Available  
Please RSVP with Cort Crawley

**RSVP:**

Cort Crawley  
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**Speaker(s):**

**Andy Wiginton**  
*Eaton Vance*  
*Executive Director*

**Jason D. Bernstein**  
**Morgan Stanley**  
*Financial Advisor*  
*Senior Vice President*

**Tyler W. Thomas, CFP®**  
**Morgan Stanley**  
*Financial Advisor*  
*Vice President*

**Sponsored by:**

Andy Wiginton & Eaton Vance

**Hosted by:**

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