Morgan Stanley

Family Wealth Education

Customized Programs Designed Around Your Family's Needs and Goals

Working with you and your Financial Advisor, our Wealth Education team will develop a customized financial education curriculum based on your family's goals and aspirations, existing knowledge and learning styles. Developed and taught by experienced wealth education specialists, the program employs a diverse set of methods to engage the family member and promote mastery. Courses can be designed for an individual member or multiple generations, and programs are held in locations that are most convenient for your family.

Personal Finance
- Goal Setting
- Saving
- Credit and Debt
- Taxes
- Risk Management
- Wealth Transfer

Investing
- Working With a Financial Advisor
- Market Dynamics
- Risk and Return
- Diversification
- Asset Allocation

Family Governance
- Articulating and Aligning Values
- Managing Family Conflict
- Stewardship
- Communication
- Decision-making
- How to Be a Trust Beneficiary

Philanthropy
- Philanthropic Mission
- Impactful Grant-making
- Trends in Modern Philanthropy
- Philanthropic Vehicles

Business Owning Family
- Conflict Resolution and Communication
- Future of the Family Business
- Family Business Management
- Inheriting a Family Business

Career and Entrepreneurship
- Career and Networking Initiatives
- Starting a Business

For additional information, or to schedule a consultation, contact your Morgan Stanley Financial advisor.

Asset allocation, diversification and rebalancing do not assure a profit or protect against loss.

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