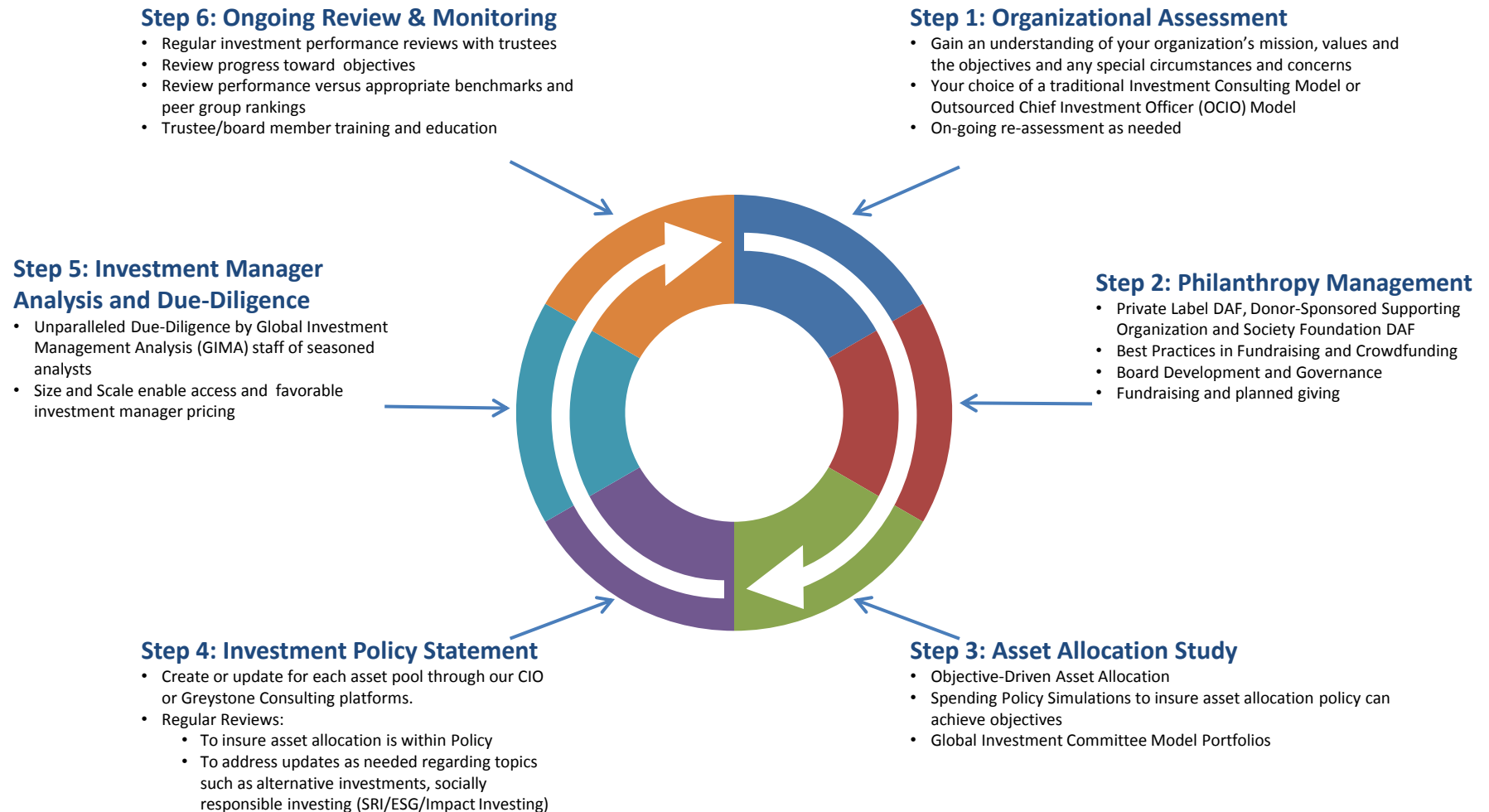


Consulting Group Institutional Services – Our Process

The Consulting Group at Morgan Stanley combines the scope, scale and oversight of a global financial services firm with the independence, objectivity and service capabilities of a boutique consulting group.



“The trustees of endowed institutions are the guardians of the future against the claims of the present. Their task is to preserve equity among generations.”

-James Tobin, Nobel Prize winning Economist at Yale University

Consulting Group Institutional Services – Our People

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- CIMA®, Certified Investment Management Analyst.
- CFP®, Certified Financial Planner™ practitioner.
- Senior Investment Management Consultant, Wharton Executive Education, University of Pennsylvania.
- MBA, Bellarmine University.
- BS in Economics, with Honors, University of Kentucky, Beta Gamma Sigma.
- Married 30+ years to his wife Jo Ann and blessed with three children.
- Community Service: Catholic Community Foundation Board of Trustees (past president) and Investment Committee; The Children's Museum of Indianapolis; Planned Giving Council; Ball State University Foundation, Professional Advisors Committee; Catholic Charities Indianapolis Agency Council; Volunteers with Trusted Mentors which provides one on one mentoring to adults re-entering society from incarceration.

C. Matthew (Matt) Fox, CFP®, CIMA®

- Vice President and Financial Advisor with 23+ years of financial services industry experience, all with Morgan Stanley.
- CIMA®, Certified Investment Management Analyst.
- CFP®, Certified Financial Planner practitioner.
- Wharton Executive Education, University of Pennsylvania, 2009.
- BA Economics, 1991, DePauw University.
- Community Service: 2009-Present - Hearts and Hands of Indiana, Board Member; 2006 World Affairs Councils of America, Delegation to Taiwan; 2000 Rotary International Group Study Exchange to India; 1995-Present - Phi Kappa Psi Home Association (Past President)
- Married to wife Natalie and blessed with three children.

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