# THE STELLA WILLIAMS GROUP at Morgan Stanley

201 East Pine Street, Suite 1100 Orlando, Florida 407-849-4740

## Our Team

The first and only Morgan Stanley Private Wealth Management team in Central Florida, we have over 50 years of combined experience[1] serving high net worth and ultra-high net worth families like yours. This experience has taught us that a well-coordinated, multidisciplinary approach is needed to address the complex challenges your family may be facing. We stay in close contact with you, your accountants, attorney and other key advisors to maintain an up-to-date understanding of your family dynamics, goals and risk tolerances. We combine this deep insight into your financial situation with a robust understanding of the global financial markets resulting in a comprehensive plan that helps you manage your family's financial life and legacy.

1) Experience details, as of 2016: David Stella has 23 years in financial services and Theresa Williams has 29 years in financial services.

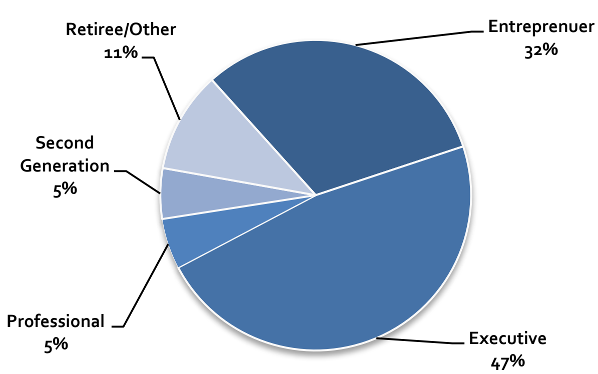
### Client Locations

## Our Investment Philosophy

We consider a client's complete financial situation – focusing on all aspects of their balance sheet, regardless of purpose, location or disposition – and then apply academically supported and empirical analysis, astute capital market strategy, and the appropriate blend of securities in a tax and fee efficient manner.

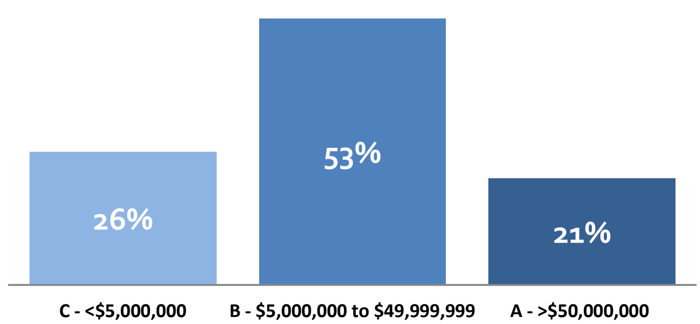
Unlike centralized investment models, we create portfolios that are not overly diversified, giving our clients the transparency they seek, and a better opportunity to meet their targets. Our investment process is designed to help each client meet their investment objectives and income requirements over time, given acceptable parameters, tying performance to their overall plan.

### Client Type




### Client Net Worth

(No. Of Families)



# THE STELLA WILLIAMS GROUP AT MORGAN STANLEY

**David J. Stella, CFP, CIMA**
*Private Wealth Advisor*
*Senior Vice President*

Drawing on over 20 years of experience in the investment management and wealth advisory industry, David leads the investment management strategy efforts of the team. David and his team work with a limited number of senior executives of public companies (section 16) and privately held business owners, as well as their families and family offices. Prior to joining Morgan Stanley, he was a senior advisor at Wells Fargo Wealth Management, where he advised the firm's wealthiest clients and led a team of wealth and investment management professionals.

David earned an MBA from the University of Notre Dame, Mendoza College of Business, and earned the Certified Investment Management Analyst (CIMA®) certification through the Wharton School of the University of Pennsylvania. He holds a B.S.B.A. in finance from the University of Central Florida. He also attained the CFP® certification awarded by the Certified Financial Planner™ Board of Standards, Inc.

David has professional memberships in the Investment Management Consultants Association, the CFA Society of Orlando and the Financial Planning Association. He has been quoted in Bloomberg Wealth Manager Magazine and has spoken on the topic of transitioning wealth of privately held companies. David, his wife, Catherine, and daughters, Caroline (freshman at Xavier University) Emily and Labrador Retriever (Garnet), reside in Orlando (College Park), Florida, and are active members of the Country Club of Orlando.

**Theresa A. Williams, CFP, CIMA**
*Private Wealth Advisor*
*Senior Vice President*

With over 20 years of experience in the financial services and wealth advisory industry, she leads the wealth planning, credit and banking service efforts of the team. Theresa and her team work with a limited number of senior executives of public companies (section 16) and privately held business owners, as well as their families and family offices. Prior to joining Morgan Stanley, she was a senior advisor at Wells Fargo Wealth Management where she advised the firm's wealthiest clients.

Theresa attended Rollins College and continued her financial education at the Wharton School of the University of Pennsylvania, completing the Certified Investment Management Analyst (CIMA) program in conjunction with the Investment Management Consultants Association. She also attained the CFP® certification awarded by the Certified Financial Planner™ Board of Standards, Inc.

Theresa has professional memberships in the Investment Management Consultants Association, served on the Rollins College Center for Leadership Development Board and the Make-a-Wish of Central Florida Board. Theresa, her husband, Michael, and daughters, Sophie and Olivia, reside in Winter Park, Florida.

## Client Service Support

**Nichole Godwin**
*Portfolio Associate*

Nichole Godwin serves as a Senior Registered Client Service Associate with Morgan Stanley Private Wealth Management working closely with the Private Wealth Advisors of the Stella Williams Group in Orlando, Florida. Her primary responsibility is to handle the day-to-day operational and administrative responsibilities. She is committed to providing outstanding customer service, and does so through her attention to detail.

Prior to joining the Orlando branch, Nichole worked as a Registered Associate with Morgan Stanley in Winter Park, FL. She holds the Series 7, Series 66 and Series 3 licenses. In addition, Nichole has obtained the internal designation of Financial Planning Associate through continued professional development.

Nichole graduated from St. Petersburg College with a Bachelor of Applied Science Degree in Management and Organizational Leadership.Nichole is a proud wife and mother who enjoys spending time with friends and family. Nichole currently lives in Orlando, FL.