Morgan Stanley

PRIVATE WEALTH MANAGEMENT

TEAM INTRODUCTION

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 and North Florida, we have over 60 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 2024: David Stella has 31 years in financial services and Theresa Williams has 37 years in financial services.

Client Locations

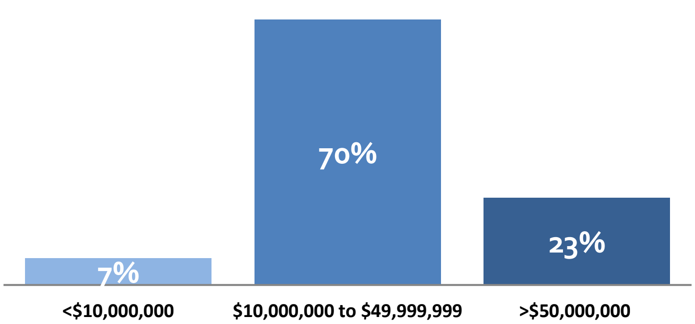
Our Investment Philosophy

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.

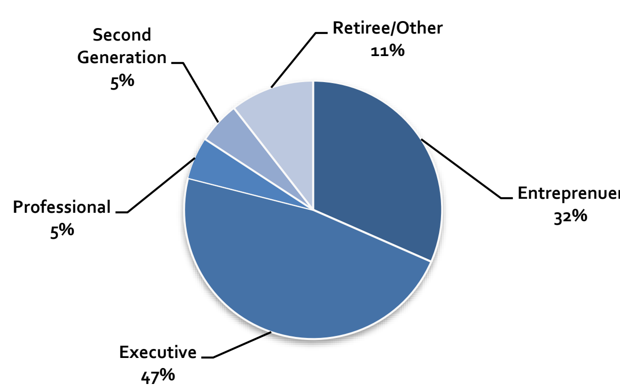
Unlike centralized investment models, we create portfolios that are not overly diversified, giving our clients the transparency they seek, and a better opportunity to meet their targets. Our investment process is designed to help each client meet their investment objectives and income requirements over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

Client Net Worth

(No. Of Families)



Client Type



THE STELLA WILLIAMS GROUP AT MORGAN STANLEY

David J. Stella, CFP®, CIMA®
Portfolio Management Director
Family Wealth Director
Senior Vice President
Private Wealth Advisor

Drawing on 27 years of experience, David helps highly accomplished entrepreneurs and executives/insiders of publicly traded companies create tailored wealth management plans based on their specific needs and goals. David focuses on constructing customized portfolios designed to meet the specific goals identified within our client's financial plan. He is uniquely qualified to advise a limited number of senior executives of public companies and privately held business owner/entrepreneurs as well as family offices.

David earned an MBA from the Mendoza College of Business of the University of Notre Dame 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. In 2018, David obtained the specialized Family Wealth Director designation through Morgan Stanley. David has spent the last 20 years advising successful families and entrepreneurs.

David enjoys playing golf, skiing, traveling, and following college sports. David, his wife, Catherine, and daughters, Caroline and Emily, and Labrador Retriever (Trip), reside in Orlando (College Park), Florida, and are active members of the Country Club of Orlando.

Theresa A. Williams, CFP®, CIMA®
Family Wealth Director
Senior Vice President
Portfolio Manager
Private Wealth Advisor

Drawing on 28 years of experience, Theresa helps highly accomplished entrepreneurs and executives/insiders of public traded companies create tailored wealth management plans based on their specific needs and goals. Theresa helps clients develop customized and comprehensive financial plans that address and memorialize the goals and dreams that they have for themselves and their family. She covers many issues including estate and legacy planning, philanthropic giving, business succession, executive equity compensation planning, and coordinated cash flow and tax planning.

Theresa is a CFP® professional awarded by the Certified Financial Planner™ Board of Standards and earned the Certified Investment Management Analyst ® (CIMA®) designation through the Wharton School of the University of Pennsylvania in conjunction with the Investment Management Consultants Association. In 2018, Theresa obtained the specialized Family Wealth Director designation through Morgan Stanley. Theresa attended Rollins College from 2000 to 2002, completing her B.S. in Communications at Kaplan University. She has over 20 years of experience in the financial services industry advising clients.

Theresa enjoys traveling, reading, and spending time with her family in her spare time. She lives in Winter Park with her husband Michael and daughters Sophie and Olivia. Theresa has a passion for children and education. She has served on the board of the Make-a-Wish of North and Central Florida and currently serves on the Rollins College Center for Leadership Development Board.

THE STELLA WILLIAMS GROUP AT MORGAN STANLEY

Asu Greer
Portfolio Associate

As a Portfolio Associate for The Stella Williams Group at Morgan Stanley, Asu focuses on providing exceptional service and strategic operational support to our clients and the team. Asu simplifies, streamlines, and delivers an extensive range of operational and account services. With her strong work ethic and her significant knowledge of the firm's internal processes and procedures, she is able to promptly address a variety of client needs with care, patience, and empathy.

Asu has been in the financial industry for over 15 years and has a deep understanding of the firm's core values. In her role, Asu always places clients first and has a strong commitment to providing clients with the highest quality of service in a professional manner and through personalized attention.

Asu was nominated and is currently serving on the Morgan Stanley National Service Council, which strives to improve client experience across the firm. She earned her Bachelors in Business Administration from Eastern Mediterranean University and her MBA from Northwest Missouri State University. Asu holds Series 7 and 66 Licenses. Prior to joining The Stella Williams Group, she worked with the Morgan Stanley Private Wealth Advisor group in Miami. Asu resides in Orlando, FL with her son Gabriel.

Nicole Hope
Financial Advisor Associate
Planning Analyst
Financial Planning Specialist

Nicole joined the Private Wealth Management team of The Stella Williams Group in 2021. Nicole services as the financial planning analyst for the team and holds the Financial Planning Analyst accreditation. Nicole creates and presents financial plans and analyses to clients and helps promote the value of the Firm's client portal and cash management and lending solutions.

Nicole is a graduate from Cornell University where she majored in Industrial and Labor Relations and served on the board of several student organizations. Nicole has gained diverse experiences during and after college through her roles working for Otis Elevator Company, Procter & Gamble, and her own charity and business that she started in college. Nicole is passionate about giving back, specifically in the area of pediatric cancer funding and research.

Born and raised in Longwood, Florida, Nicole grew up in the Central Florida area. After living in Ithaca, Seattle, Milan, Chicago, and New York City, Nicole has laid down her roots back in Central Florida where she resides.

THE STELLA WILLIAMS GROUP AT MORGAN STANLEY