

Morgan Stanley

November, 2022

Bryan Stephens Receives Family Wealth Director Designation

New York City, 11/2022 -- Morgan Stanley announced today that Bryan Stephens, a Private Wealth Advisor in the Firm's Wealth Management office in New York City, has earned Morgan Stanley's Family Wealth Director (FWD) designation, which is held by only a select 4% of Morgan Stanley Financial Advisors.

"This is an exceptional achievement for Bryan and an attestation of his commitment to today's high net worth families. Bryan has demonstrated a sophisticated approach to the management of significant wealth that helps to set him apart from others within the industry," said John Palazzetti, Complex Manager.

Designated Family Wealth Directors must demonstrate professional knowledge and experience in a range of wealth management solutions including estate planning strategies, alternative investments, control and restricted securities, lending, hedging and monetization, and business succession planning.

The FWD designation also entitles Bryan to specialized access to a variety of family advisory services including, family governance and wealth education, philanthropy management and lifestyle advisory.

Bryan has been a member of the financial services industry for 22 years. As a Financial Advisor with Morgan Stanley, he offers a full suite of financial planning and investment services to individual clients, institutions, foundations and endowments.

Bryan holds a BA, Economics, and is a member of the Firm's Master's Club.

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

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CRC 4270176 03/2022

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