

Morgan Stanley

The Stevens Group at Morgan Stanley

Our Sounding Board Service

If someone is important to you, they are important to us.

At the Stevens Group, we make ourselves available to be a sounding board for friends and family of our clients. We became Financial Advisors to help people make informed decisions with their financial affairs. Financial success is a matter of choice, not chance and the most fulfilling part of our job is helping people make informed choices.



How Our “Sounding Board” Service Works

If you have a family member or friend who is facing their financial future with apprehension instead of anticipation, we make ourselves available for a consultation where we offer feedback about the track they are currently on. This is a free value-added service people have found to be a valuable investment of their time. Keep in mind, a friend or family member does not need to become a client to take advantage of this service.

Bottom line is, if they are important to you, they are important to us.

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