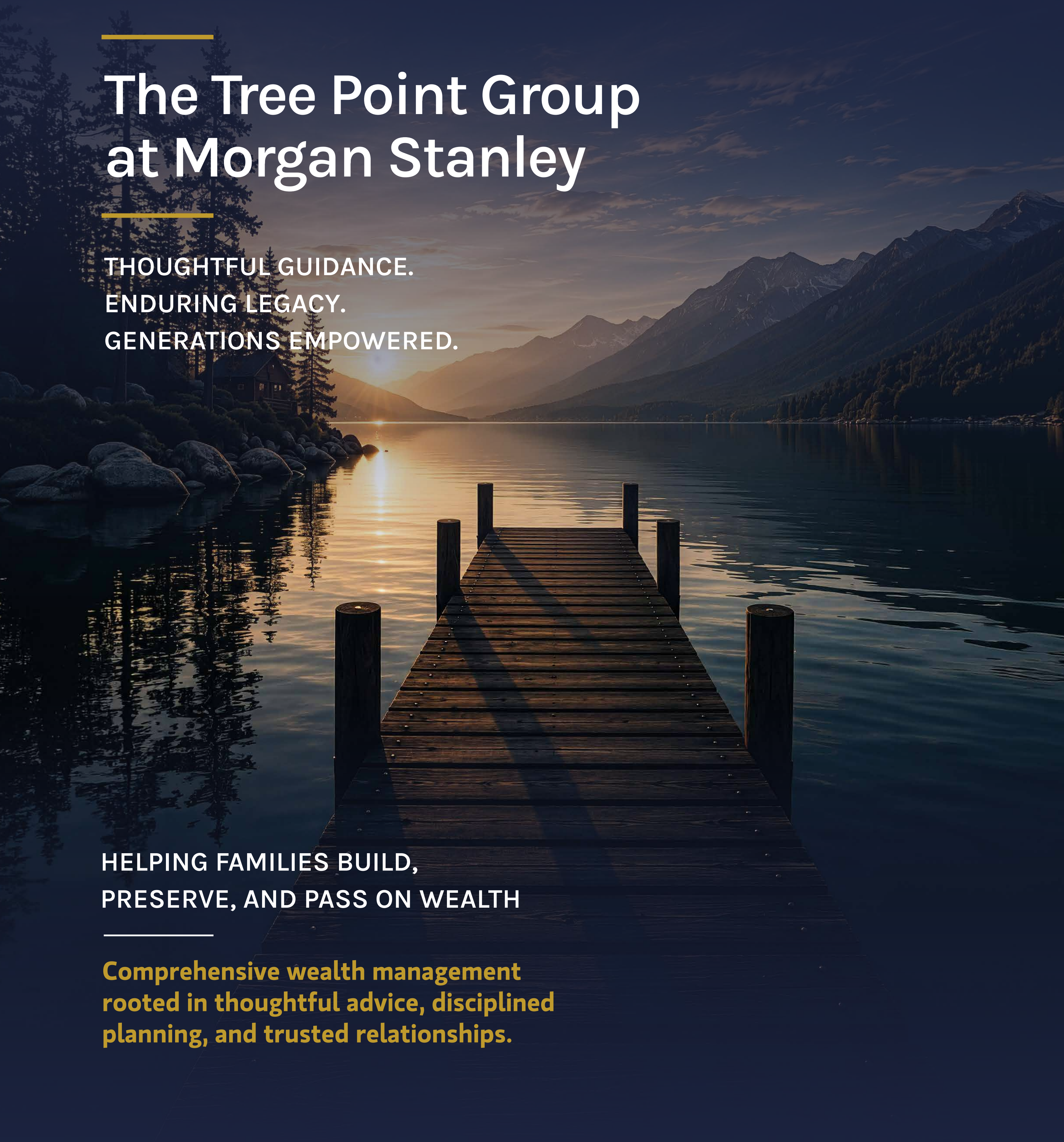
Morgan Stanley

WEALTH MANAGEMENT

The Tree Point Group at Morgan Stanley

THOUGHTFUL GUIDANCE.
ENDURING LEGACY.
GENERATIONS EMPOWERED.



HELPING FAMILIES BUILD,
PRESERVE, AND PASS ON WEALTH

Comprehensive wealth management rooted in thoughtful advice, disciplined planning, and trusted relationships.

Our Team at a Glance

At The Tree Point Group, we believe wealth extends beyond financial assets. It reflects the people you care about, the values you hold, and the legacy you hope to create.

As our practice has grown to serve individuals, families, and generations of clients, we chose a name that reflects both our philosophy and our approach.

Tree symbolizes growth, resilience, and enduring strength. Like a tree with deep roots, wealth should be thoughtfully cultivated to support each generation and create opportunities for the next.

Point represents perspective, direction, and stability. In an evolving financial landscape, we help clients make informed decisions with clarity and confidence.

Together, The Tree Point Group reflects our commitment to personalized advice, disciplined investment management, and exceptional client service.

How Do You Imagine Your Future?

What does retirement look like to you?

More time with family. Travel. Giving back. Pursuing the passions you've put on hold.

What opportunities do you want to create for the people and causes that matter the most to you?

Every meaningful financial strategy begins with a clear understanding of where you are today and where you want to go.

The Strength of Our Team

The Tree Point Group brings together experienced professionals with diverse areas of focus and a shared commitment to helping individuals, families, business owners, and institutions navigate life's most important financial decisions.

300+ Years of Industry Experience

Bringing perspective gained across market cycles and generations of client relationships.

Six CERTIFIED FINANCIAL PLANNER® Professionals

Providing comprehensive financial planning backed by technical skill and the highest standards of client service.

Corporate Retirement Director (CRD®)

Providing guidance to retirement plan sponsors, business owners, and participants through retirement plan consulting, fiduciary best practices, participant education, and retirement readiness.

Morgan Stanley's Global Resources

Delivering sophisticated investment solutions supported by world-class research and institutional capabilities.

Relationships That Last

Many of our client relationships span decades, reflecting the trust we've earned through personalized advice, exceptional service, and long-term collaboration.

Global Sports & Entertainment Director

Experience in serving the complex wealth management needs of athletes, entertainers and high-profile professionals, including strategies for unique income streams, career transitions and long-term wealth preservation.

Our Services

Wealth Management
- Comprehensive Financial Planning
- Portfolio Management
- Asset Management

Retirement & Workplace Planning
- Retirement Planning
- Corporate Retirement Plan Consulting
- Retirement Plan Fiduciary Guidance
- Participant Education
- 401(k), 403(b), and Retirement Plan Rollovers

Estate & Legacy Planning
- Estate Planning Strategies
- Education Planning

Business & Executive Planning
- Business Planning and Exit Strategies
- Business Succession Planning
- Executive Compensation Planning

Tax & Risk Management
- Tax-Efficient Planning
- Cash Management and Lending Solutions
- Insurance and Long-Term Care Planning

What Guides Everything We Do

1 THOUGHTFUL GUIDANCE

Helping clients make informed financial decisions through personalized advice and disciplined planning.

2 ENDURING LEGACY

Creating strategies designed to preserve wealth, reflect your values, and support future generations.

3 GENERATIONS EMPOWERED

Helping today's decisions create tomorrow's opportunities.

Preserving Wealth. Protecting Legacies.

Building wealth is only part of the journey. Preserving it allows future generations to benefit from what you've created.

We work closely with your attorneys, accountants, and other trusted professionals to help coordinate strategies designed for the thoughtful and efficient transfer of weatlh.

Our focus is simple: helping protect today's success while creating opportunities for tomorrow.

A Team of Professionals:

CFP® *CA#0G25487*
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Portfolio Management Director
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• 25+ years of experience in financial services.

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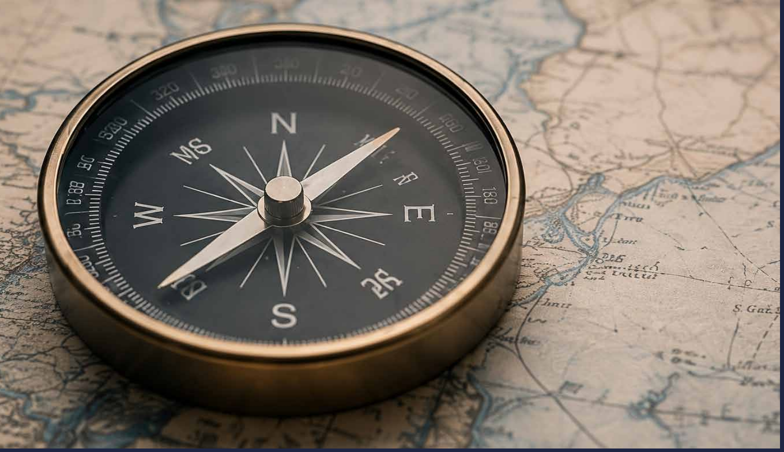
• 25+ years of client support.



Let’s Start the Conversation

**Every family has a story.
Every legacy begins with a conversation.**

Whether you’re seeking a second opinion, navigating a transition, preparing for retirement, or planning for future generations, we’re here to help you make informed financial decisions with confidence.

Morgan Stanley

**THE TREE POINT GROUP
AT MORGAN STANLEY**

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