Morgan Stanley

PRIVATE WEALTH MANAGEMENT

The Vector Group at Morgan Stanley Private Wealth Management

Our Story

With over 75 years of combined experience, we are committed to fostering prosperity and helping to create enduring legacies. By empowering you and your family through comprehensive professional guidance, we help make your money work so you can make the world work.

Exceptional wealth management begins with truly understanding the people we serve. Our clients trust in us not only for our deep investment experience, but also because we see the full picture—their goals, their values, and the legacies they aspire to build.

We take full advantage of the depth and breadth of Morgan Stanley's platform—from exclusive investment opportunities and alternative strategies to industry-leading research and dedicated internal specialists—to deliver solutions tailored to your needs.

Based in New York, San Francisco, and Palm Beach, The Vector Group at Morgan Stanley has established itself as a valued resource for High and Ultra High Net Worth Families and Foundations across the United States. Our clients have complex financial needs and benefit from our world-class service.

The Vector Group at Morgan Stanley

450 Royal Palm Way
4th Floor
Palm Beach, FL 33480

55 East 52nd Street
14th Floor
New York, NY 10055

212-893-7515

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Our Focus

1 **Tailored Investment Strategies**

- Sophisticated & diversified portfolios customized for families, partnerships, trusts, foundations and beyond.

2 **Comprehensive Wealth Coordination**

- Seamless collaboration with CPAs, attorneys, and other stakeholders to align every aspect of your financial life.
- Integration of outside assets into your holistic financial plan: real estate, stock options, equities, and more.

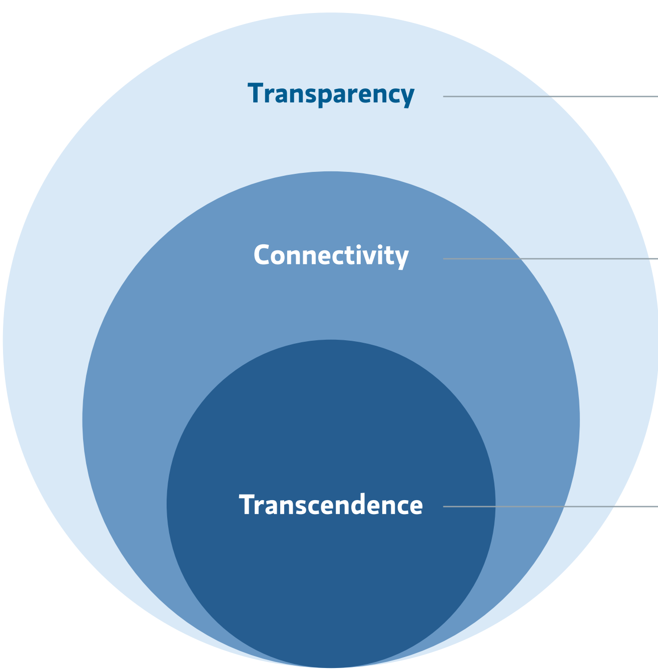
3 **Multigenerational and Mission-Driven Focus**

- Guiding families and institutions across generations to help sustain wealth, values, and impact.

4 **Elevated Client Experience**

- White-glove service, deep understanding, and commitment to anticipating your evolving needs.

Our Values



We believe our clients deserve not just insight into every recommendation, but confidence in the integrity behind it. In a world of complexity, clarity is a form of trust.

Exceptional outcomes are built on meaningful connections: with our clients, their trusted advisors, and our best-in-class global network of specialists.

We are committed to helping our clients move beyond reactive choices toward enduring strategies that reflect their values, ambitions, and legacies.

Our Team

M. David Sherrill, CFA,® CMT®
Managing Director
Private Wealth Advisor
Family Wealth Director
Senior Portfolio Management Director

40 years in the financial industry

Daniel Sheldon, CFA®
Senior Vice President
Financial Advisor

10 years in the financial industry

Giselle Cantada
Assistant Vice President
Group Director
25 years in the financial industry

Sayre Rapperport
Investment Consultant
3 years in the financial industry

Kate Moran
Private Wealth Management Analyst
5 years in the financial industry

Ty Hardimon
Private Wealth Management Analyst
3 years in the financial industry

Chantal Spendiff
Client Service Associate
2 years in the financial industry

Evan Sarno
Client Service Associate
1 year in the financial industry

Our Process

Discovery > Strategic Alignment > Planning & Structuring > Implementation > Monitoring & Communication > Re-Evaluation & Evolution

Our Services

Wealth Management	Foundation Services	Executive Financial Services
Retirement Planning	Lending Products	Trust & Estate Planning Strategy
Planning for Education Funding	Insurance: Life & Long Term Care	Impact Investing
Cash Management Services	Tax-Advantaged Investing	Donor Advised Funds & Gifting Advice

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