

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

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

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212-893-7515

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management  
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## Our Focus

### 1 Tailored Investment Strategies

- Sophisticated & diversified portfolios customized for families, partnerships, trusts, foundations and beyond.
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### 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.
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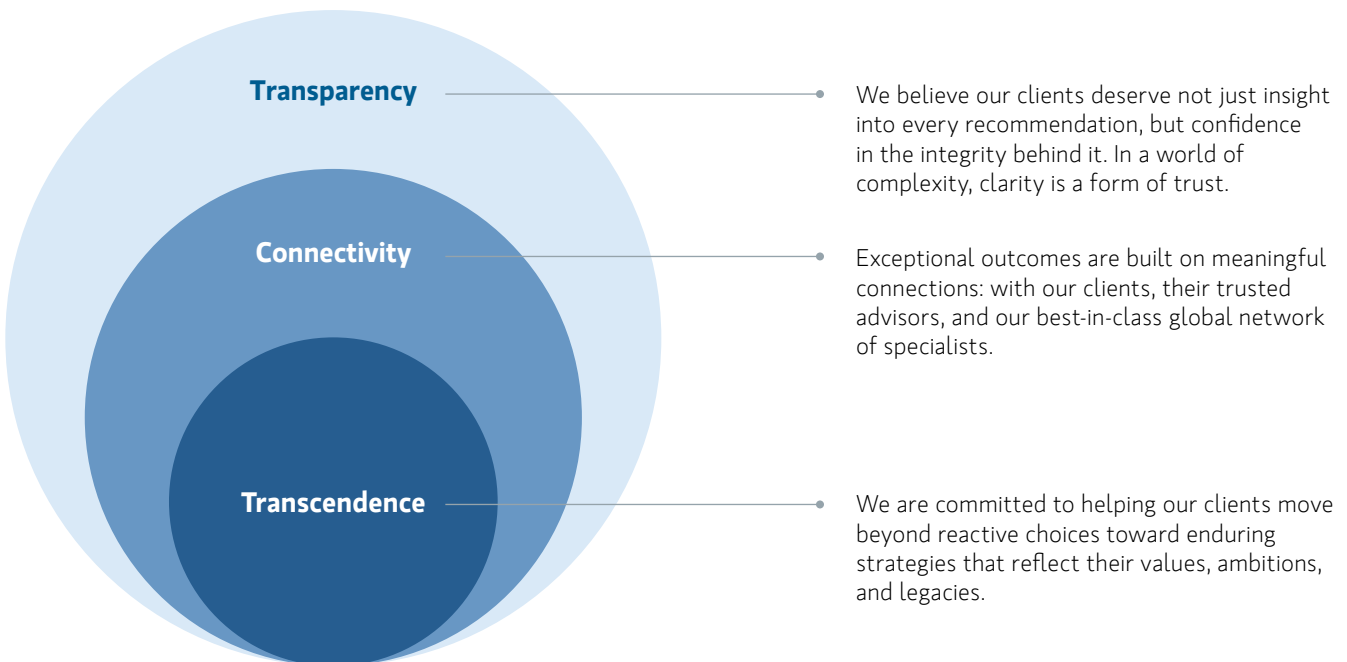
### 3 Multigenerational and Mission-Driven Focus

- Guiding families and institutions across generations to help sustain wealth, values, and impact.
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### 4 Elevated Client Experience

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



## 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



## Our Services

Wealth Management

Retirement Planning

Planning for Education Funding

Cash Management Services

Foundation Services

Lending Products

Insurance: Life & Long Term Care

Tax-Advantaged Investing

Executive Financial Services

Trust & Estate Planning Strategy

Impact Investing

Donor Advised Funds & Gifting Advice

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