

The Westchester Group at Morgan Stanley

Questions We Help Answer

- Am I taking on too much risk in my portfolio? Are my investments set up for success?
- Life is constantly changing. How do I safeguard my future, knowing certain events can alter my plans?
- Making sure my estate goes to the people and organizations I care about is important to me. How do I leave a lasting legacy?
- Are there ways to generate cash flow without liquidating my securities and incurring taxes?
- I don't want to be a burden to my children later in life. How do I plan for retirement so I can maintain my current lifestyle without worrying I'll run out of money?
- Are my charitable donations having the impact I want them to have?
- When does it make sense to add alternative investments (such as real estate or private equities) to my investment strategy?
- Life's risks can reveal themselves in many ways – from loss of life to loss of health to loss of income. How do I protect myself and my family from life's unknowns?
- Is there a way to make sure I don't run out of income once I get into retirement?
- If I leave my company, what happens to my 401(k) account? What are my options?

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