

## The Wood Group at Morgan Stanley

*Helping individuals and families navigate complex financial decisions with clarity and confidence.*



### **Nisha Bott Chisena**

First Vice President, Financial Advisor  
Portfolio Manager  
Workplace Advisor – Equity Compensation  
NMLS #533384

### **Paul Fitzsimmons, CFP®, CRPC®, CRPS®**

Senior Vice President, Financial Advisor  
Corporate Retirement Director  
Workplace Advisor – Equity Compensation  
NMLS #1268460

### **Jay Wood**

Senior Vice President, Financial Advisor  
Workplace Advisor – Equity Compensation  
NMLS #1270218

### **Carolina McGoey, CFP®, QPFC®**

Associate Vice President, Financial Advisor  
Insurance Planning Director  
Workplace Advisor – Equity Compensation  
NMLS #190112

### **Brian J. Nerreau, CFP®**

Senior Vice President, Financial Advisor  
Insurance Planning Director,  
Workplace Advisor – Equity Compensation  
NMLS #1268446

### **Tack Simmons**

Vice President, Senior Portfolio Manager  
Financial Advisor  
NMLS #1290563

## The Wood Group at Morgan Stanley

We work with individuals and families whose financial lives have grown more complex – where investments, taxes, and long-term planning are deeply interconnected.

Our goal is to bring clarity and structure to those decisions, helping clients move forward with confidence and purpose.

Our approach to wealth management extends well beyond portfolio construction. By integrating investment strategy with financial planning, tax considerations, and legacy objectives, we help ensure that each decision supports your broader financial life.

Through Morgan Stanley, our clients benefit from institutional-level resources, a broad range of investment solutions, and a sophisticated platform designed to support complex financial needs.

While clients may focus on wealth accumulation, income or capital preservation, their needs often extend further – encompassing retirement planning, distribution strategies, trust and estate considerations, and long-term legacy planning.

We work closely with:

- Families managing multigenerational wealth
- Individuals and families navigating increasingly complex financial decisions.
- Corporate executives navigating equity compensation
- Business owners before and after liquidity events

***We build long-term relationships grounded in clarity, trust, and thoughtful guidance through decision-making at every stage.***

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# A Team Built Around You

A coordinated team of professionals working together to deliver thoughtful, high touch advice across virtually every aspect of your financial life.

## Investment Leadership



**Nisha Chisena**  
First Vice President,  
Financial Advisor  
Portfolio Manager

Leads portfolio construction and investment strategy, ensuring portfolios remain aligned with client's goals, risk profile, and market conditions.



**Paul Fitzsimmons, CFP®, CRPC, CRPS**  
Senior Vice President,  
Financial Advisor  
Corporate Retirement Director

Advises executives and business owners on retirement, equity compensation and long-term wealth strategy, integrating financial planning into complex financial decisions.



**Brian Nerreau, CFP®**  
Senior Vice President,  
Financial Advisor

Focuses on risk management and insurance planning, helping clients protect and preserve wealth as part of a broader financial plan



**Tack Simmons**  
Vice President, Senior  
Portfolio Manager,  
Financial Advisor

Oversees portfolio strategy and implementation, focusing on disciplined management and long-term alignment with client objectives.



**Carolina McGoey, CFP®, QPFC®**  
Associate Vice President,  
Financial Advisor

Brings clarity to complex financial decisions, aligning investments, financial planning and long-term family and legacy goals.



**Jay Wood**  
Senior Vice President,  
Financial Advisor

Provides seasoned guidance on complex financial decisions, bringing decades of experience to help clients navigate important financial moments with confidence.

## Client Experience & Operations:



**Brenner Anderson**  
Registered Client Service  
Associate

Supports client relationships, and ensures a seamless, responsive experience.



**Estefanía Munguía**  
Portfolio Associate, Registered  
Client Service Associate

Coordinates portfolio implementation and client service with accuracy and efficiency.



**Shauna Simpson**  
Vice President, Wealth  
Management Associate

Leads client experience and relationship management, delivering consistent, high-quality service.

Our structure ensures clients have the right support, both strategic and day-to-day, at every stage.

# Recognition and Credentials



## 2023- 2026 Forbes Best-In-State Wealth Management Teams<sup>1</sup>



## NAPA Top Defined Contribution Advisor Teams 2024 - 2026<sup>2</sup>



### CFP® - Certified Financial Planner™

- Paul Fitzsimmons
- Carolina McGoey
- Brian Nerreau



### Portfolio Manager

- Nisha Chisena
- Huntington “Tack” Simmons



### CRPS® - Chartered Retirement Plans Specialist®

- Paul Fitzsimmons



### Insurance Planning Director

- Carolina McGoey
- Brian Nerreau



### CRPC® - Chartered Retirement Planning Counselor®

- Paul Fitzsimmons



### Corporate Retirement Director

- Paul Fitzsimmons



### QPFC® - Qualified Plan Financial Consultant®

- Carolina McGoey



### Workplace Advisor – Equity Compensation

- Nisha Chisena
- Paul Fitzsimmons
- Carolina McGoey
- Brian Nerreau
- Jay Wood



### 2021-2026 Pacesetter's Club<sup>3</sup>

- Carolina McGoey

**Our credentials reflect deep experience – but our focus remains on helping clients navigate complex financial decisions with clarity and confidence.**

1. Source: Forbes.com (Awarded 2023, 2024, 2025, 2026). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award. [Award Disclosures](#).  
 2. Source: [napa-net.org](#) (March 2024, 2025, 2026). Data compiled by NAPA based on self-reported assets under advisement as of Dec 31, 2023, Dec 31, 2024.  
 3. Pacesetter's Club membership is no guarantee of future performance. Please refer to important criteria and methodology at the end of this material.

## How We Work

**We help bring clarity and structure to complex financial decisions – so every part of your financial life is aligned and working together.**



# Our Investment Philosophy

**We apply the same disciplined, thoughtful approach to investing that guides all of our work – focused on helping clients make thoughtful decisions through changing markets.**



## ASSET ALLOCATION

We select experienced managers with consistent disciplined approaches – bringing structure and clarity to portfolio construction.



## DIVERSIFICATION

We diversify across asset classes and managers to thoughtfully manage risk and improve consistency over time.



## INVESTMENTS

We build portfolios aligned with your broader financial plan – balancing growth, risk and long-term objectives .



## REBALANCING

We rebalance portfolios systematically – maintaining discipline and adapting as markets and your life evolve.



## BEHAVIORAL DISCIPLINE

Emotions can undermine long-term results. We help clients stay focused, avoid reactive decisions, and remain aligned with their plan.



## LONG-TERM FOCUS

We invest with a long-term perspective – cutting through short term noise and keeping decisions aligned with what matters most.

## How We Work With You

Our work begins with a deep understanding of your full financial picture – then evolves into a strategy designed to adapt with you over time. We bring structure, discipline and coordination to every decision so you can move forward with clarity and confidence.

- ✓ Start with **what matters most** to you. We take the time to understand your priorities, values, and long-term objectives.
- ✓ Develop a coordinated **financial strategy**. Integrating investments, planning, and long-term goals into one cohesive approach.
- ✓ **Apply experience and disciplined thinking**. Helping you stay focused, avoid reactive decisions, and navigate complexity with confidence.
- ✓ Provide ongoing **guidance and oversight**. Monitoring portfolios and adapting thoughtfully as markets and your life evolve.
- ✓ Leverage the **full resources of Morgan Stanley**. Delivering access to institutional insights, solutions, and intellectual capital.
- ✓ Deliver an **exceptional client experience**. Ensuring responsiveness, continuity, and consistent standard of care.

We coordinate closely with your broader advisory team, including:



Tax professionals



Trust and estate attorneys

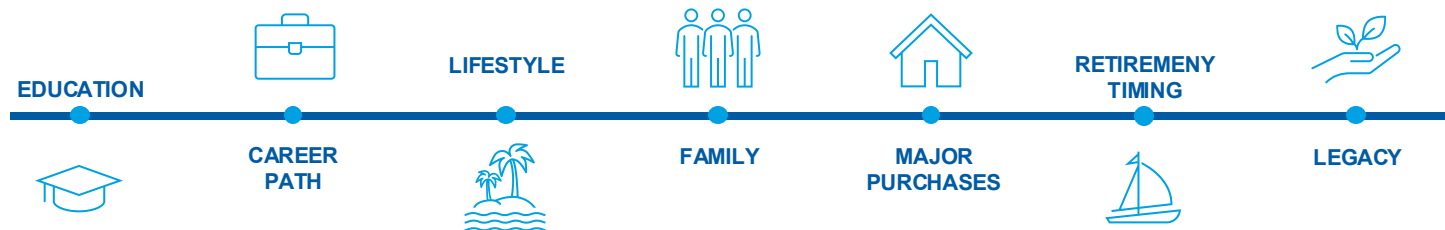
**Our goal is to simplify complexity and provide clarity at every stage of your financial life.**

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# Aligning Strategy with Your Life Stages

Your financial life evolves over time – and your strategy should evolve with it. We take a holistic view across your assets, liabilities, and goals to ensure each decision supports your broader financial picture.

**Financial priorities shift across life stages – your strategy should evolve alongside them.**



## EARLY / MID-CAREER

### Priorities

- Purchasing a home
- Build an emergency fund
- Protecting your family
- Planning for education
- Growing your family

## LATE CAREER

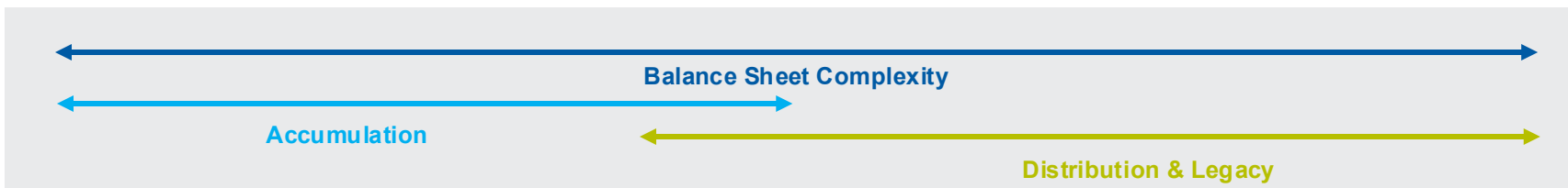
### Priorities

- Expanding or upgrading your home
- Funding education and supporting family
- Planning for healthcare needs
- Preparing for retirement

## RETIRED

### Priorities

- Generating sustainable income
- Managing healthcare and unexpected expenses
- Lifestyle planning
- Legacy and wealth transfer



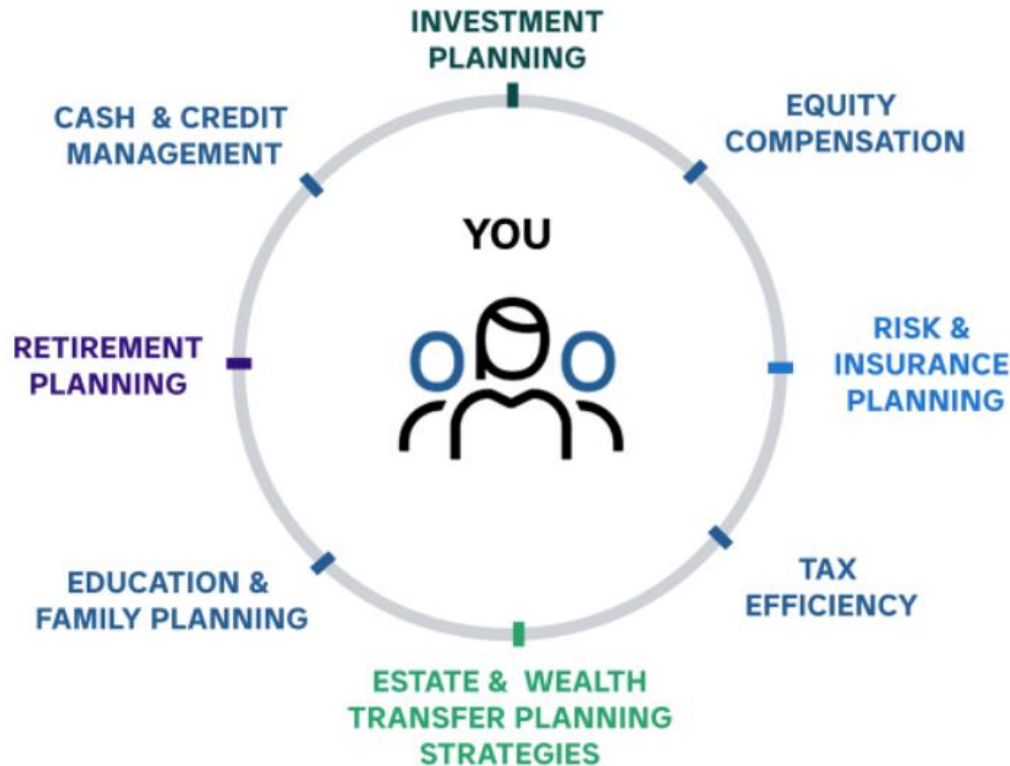
# Designing Your Financial Plan

Once we understand your full financial picture, we design a personalized roadmap to help you achieve your goals, protect what matters most and plan for the future.



# Your Financial Life, Coordinated

We coordinate every aspect of your financial life – so nothing is overlooked.

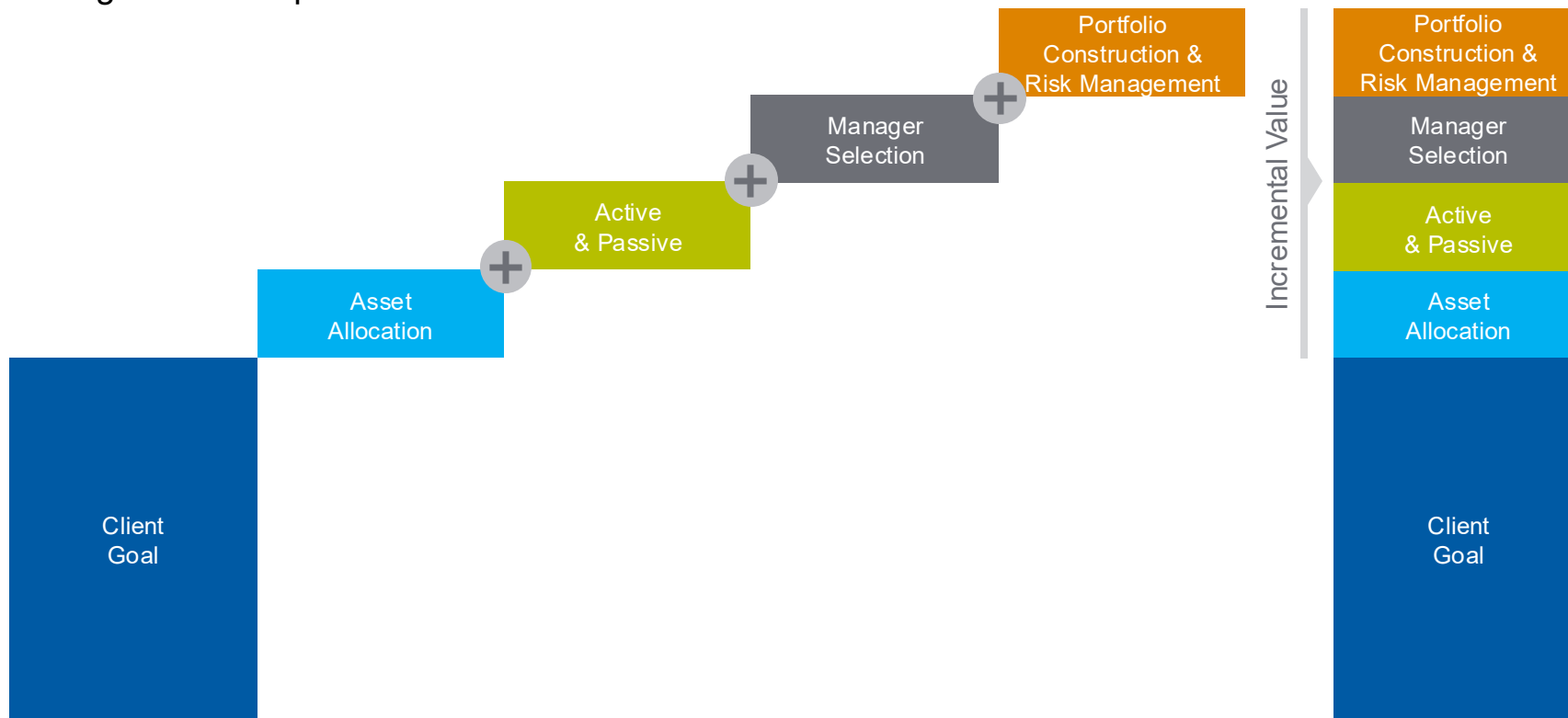


**All coordinated through one advisory relationship.**

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# How We Add Value Beyond Asset Allocation

We go beyond basic portfolio construction – bringing discipline, manager selection, and ongoing risk management to improve outcomes over time.



This **layered approach** helps us manage risk, capture opportunities, and adapt as your life evolves - **all aligned with your goals, time horizon, and broader financial plan.**

## Bringing Clarity to Complex Financial Decisions

We work with individuals and families whose financial lives have grown more complex – helping them make thoughtful, well-informed decisions across investments, planning, and long-term strategy.

Through a disciplined process and a coordinated team, we bring structure, perspective and continuity to your financial life as it evolves.

**A coordinated approach designed to simplify complexity – so you  
can focus on what matters most.**

All delivered through one coordinated advisory relationship.

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## The Wood Group at Morgan Stanley



**Address:**

4 Landmark Square, 2<sup>nd</sup> Floor,  
Stamford CT 06901  
Fax: 203-326-6950 or 203-967-7006

## How to Find Us

Team Website



Morgan Stanley  
Online



**Email/Tel:**

<a href="mailto:Nisha.B.Chisena@morganstanley.com">Nisha.B.Chisena@morganstanley.com</a>	(203) 326-6960
<a href="mailto:Paul.Fitzsimmons@morganstanley.com">Paul.Fitzsimmons@morganstanley.com</a>	(203) 326-6946
<a href="mailto:Carolina.McGoey@morganstanley.com">Carolina.McGoey@morganstanley.com</a>	(203) 326-6964
<a href="mailto:Brian.Nerreau@morganstanley.com">Brian.Nerreau@morganstanley.com</a>	(203) 326-6942
<a href="mailto:Huntington.Simmons@morganstanley.com">Huntington.Simmons@morganstanley.com</a>	(203) 326-6903
<a href="mailto:Jay.Wood1@morganstanley.com">Jay.Wood1@morganstanley.com</a>	(203) 326-6966
<a href="mailto:Estefania.Munguia@morganstanley.com">Estefania.Munguia@morganstanley.com</a>	(203) 967-7112
<a href="mailto:Shauna.Simpson@morganstanley.com">Shauna.Simpson@morganstanley.com</a>	(203) 326-6958
<a href="mailto:Brenner.Anderson@morganstanley.com">Brenner.Anderson@morganstanley.com</a>	(203) 326-6999

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## Disclosures:

### 2023-2026 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (2023-2026). Forbes Best-In-State Wealth Management Teams ranking awarded in 2023, 2024, 2025, 2026. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in March of the previous year the award was issued, having commenced in March of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC, for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each Financial Advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. These rankings are not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

### 2024, 2025, 2026 NAPA Top Defined Contributor (DC) Advisor Teams

Source: [napa-net.org](http://napa-net.org) (March 2024-2026) awarded in 2024-2026. This ranking was determined through an evaluation process conducted by NAPA based on self-reported assets under advisement as of Dec 31, 2025. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to NAPA to obtain or use the ranking. Nominees must be individual advisor team/offices with a defined contribution book of business, in a single physical location. To be considered, firms had to submit responses to an application form, including information about their practices, notably their defined contribution (DC) assets under advisement. The list is created and conducted by the National Association of Plan Advisors, an affiliate organization of the American Retirement Association, a non-profit association. Ratings are based on the opinion of NAPA and may not be representative of any one client's experience nor indicative of the advisor's future performance.

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