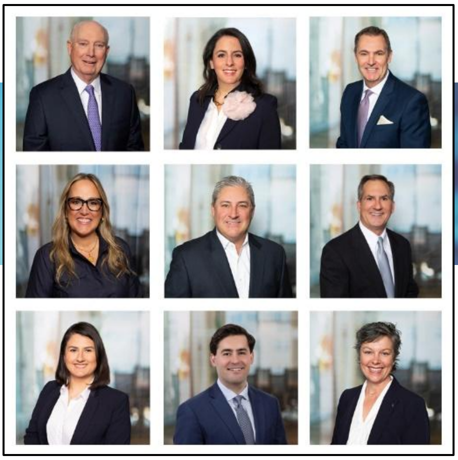
Morgan Stanley

The Wood Group at Morgan Stanley



We help successful individuals and families navigating increasingly complex financial lives—bringing clarity to decisions across investments, taxes, and long-term planning.

Who We Serve

Clients come to us when their financial lives become more complex—and decisions carry greater consequence.

- Families managing multi-generational wealth
- Professionals navigating financial transitions
- Corporate executives with equity compensation
- Business owners before and after liquidity events

The Wood Group Approach

DISCOVER → STRUCTURE → IMPLEMENT → OPTIMIZE → EVOLVE

What We Help With

Investments | **Planning** | **Complex Situations**

- **Investments**: Portfolio Construction; Risk Management; Tax-Aware Strategies
- **Planning**: Retirement Planning; Estate Planning & Legacy Coordination
- **Complex Situations**: Philanthropy & Insurance; Business Transitions; Equity Compensation

Awards and Recognitions

- NAPA TOP DC ADVISOR TEAMS — 2024 NAPA Top Defined Contribution Advisor Teams
- NAPA TOP DC ADVISOR TEAMS — 2025 NAPA Top Defined Contribution Advisor Teams
- NAPA TOP DC ADVISOR TEAMS — 2026 NAPA Top Defined Contribution Advisor Teams

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The Wood Group at Morgan Stanley Team Photo:

(Left to Right): Jay Wood, Financial Advisor, Carolina McGoey, Financial Advisor, Brian Nerreau, Financial Advisor, Nisha Chisena, Financial Advisor, Paul Fitzsimmons, Financial Advisor, Tack Simmons, Financial Advisor, Estefania Munguia, Portfolio Associate, Brenner Anderson, Client Service Associate, Shauna Simpson, Wealth Management Associate

2024-2026 NAPA's Top DC Advisor Teams
Source: Source: napa-net.org (Awarded 2024-2025) Data compiled by NAPA based on self-reported assets under advisement as of Dec 31 of the year prior to year the award was given. Please refer to important criteria and methodology at the end of this material.

2024-2025 NAPA's Top DC Advisor Teams
Source: napa-net.org awarded in 2024-2025. Each ranking was determined based on self-reported assets under advisement as of Dec 31, of the year prior to the year the award was given. 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.

CRC 5374893 04/2026