



## February Newsletter

**Fun Fact: Did you know that just one year ago AI could not count the number of R's in "Strawberry"?**

February has brought us the first significant market volatility of the year.

Depending on the day it can be very difficult to determine what is driving your investments up or down at any given moment.

This is a really good time to review what you have, how it is being affected, and whether or not you should be holding more cash or taking advantage of lower prices by investing that cash. We have a wealth of resources to provide analysis of how your account is being affected by the volatility, as well as giving you access to cash flow planning tools you can play with on your own.

Please let us know how we can help or answer any questions that are on your mind.

A couple really interesting links below including an event surrounding the rise of robot technology... as well as helpful resources and information for accessing your Morgan Stanley tax documents.



### The Alts Report

Hear from industry innovators across Morgan Stanley Wealth Management leadership and fund manager partners as they discuss the trends and opportunities shaping the alternative investments landscape.

[Watch Here](#)

### The Trends that will shape AI and Tech in 2026

2026 is coming fast—quantum breakthroughs, leaner compute, and “super agents” are about to redefine how work gets done.

[Read Here](#)



### The Robots are Coming: AI Gets Physical

This session will explore how innovation and technology are transforming the global economy and what it means for investors in the years ahead.

[Register Here](#)

## TAX INFORMATION

[2025 Tax Tables](#)

[2026 Tax Tables](#)



#### Access Your Tax Documents

For secure online access to your tax forms, follow these simple steps:

1. Log into your account via Morgan Stanley Online
2. Click the Accounts tab
3. Select the Documents tab
4. Go to the Statement drop-down tab
5. Select Tax Documents and download them

Please note: Some K-1s can be accessed via iCapital which can be accessed through your Morgan Stanley Online account.

[Access Here](#)



#### How To Add Your CPA/Tax Advisor

1. On MSO, go to **"Security Center"**
2. Click on **"Account Access"**
3. Enter your CPA / Tax Advisor as a Vendor (Trusted Third-Party)

***Your tax documents will now be issued to them directly.***

[Access Here](#)



From Left to Right: Sean R York, Senior Vice President, Investment Management Consultant; Maddie Johnston, Registered Client Services Associate; John Polley Vice President, Senior portfolio Manager, Branch Manager

[Our Website](#)

[Signature of Primary Contact]

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Morgan Stanley Wealth Management  
2000 Westchester Avenue, Purchase, NY 10577-2530 USA

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