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]