

THE RETIREMENT REPORTER

Official Newsletter of the Trailhead Retirement Planning Group

Trailhead Group Updates

The Trailhead Retirement Planning Group at Morgan Stanley is thrilled to share that we will soon be moving our office over to the Willis Tower (233 S. Wacker Dr.) in downtown Chicago! There have been two Morgan Stanley offices downtown for a number of years and the plan is to combine both complexes into one. While we have thoroughly enjoyed the years spent in the Franklin Center, we are looking forward to the transition over to an elevated working space that will continue to allow us to provide exceptional service to all our clients. We will be moving offices at the beginning of June and will provide more updates as we get closer to the date. Please note there will be no changes to any of our phone lines. We look forward to welcoming you into the new space!

New Financial Advisor: David V. Iannalfo, CFP®, CRPC®

David is a second-generation Financial Advisor and began his career interning in Morgan Stanley's Wealth Management Department while attending DePaul University. After graduating, he held various positions at different companies within the financial industry

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which provided him with invaluable knowledge in understanding a range of client situations. David then joined the Trailhead Retirement Planning Group as a Wealth Management Associate eventually moving his way up to an Investment Consultant.

David holds his CERTIFIED FINANCIAL PLANNER™ (CFP®) and Chartered Retirement Planning CounselorSM (CRPC®) designations, as well as his Series 7, Series 66, and numerous state Insurance Agent licenses.

Outside of the office, David can be found playing golf with friends and family, spending time at the beach, fishing off the coast of Maine, and cheering for his favorite Boston sports teams from afar.



Team Member Promotions

Please join us in congratulating Barbara Martin, Blake Kauffmann, and Jack Starkey on their recent title promotions at Morgan Stanley. Barb Martin was promoted to Vice President, Business Development Associate at Morgan Stanley; Blake Kauffmann was promoted to Assistant Vice President, Investment Consultant at Morgan Stanley; and Jack Starkey was promoted to Assistant Vice President, Investment Consultant at Morgan Stanley. They are beyond grateful for the clients they service, as well as their supportive team members, who all helped make this possible!





Forbes Best-In-State Wealth Management Team Recognition

For the 3rd year in a row, the team has been honored by Forbes/SHOOK as one of its Best-In-State Wealth Management Teams! More information can be found at this link: <https://www.forbes.com/lists/wealth-management-teams-best-in-state/>

Forbes Best-In-State Wealth Management Teams
2023-2025

Source: Forbes.com (Awarded 2023-2025). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year the award was issued.

Please see additional information at the end of the document.

Mark your calendar for our upcoming "Retirement University" Virtual Workshop:

"Age-Proof Your Brain"

Thursday, March 20th, 12:00 CST, with Dr. Marc Milstein. Dr. Milstein will discuss:

- Simple tips to do every day that supercharge your memory, productivity, and lower risk for dementia and Alzheimer's.
- Quick and actionable steps you can do every morning to help you get energy-boosting sleep.
- Which surprising foods boost memory and the one sneaky ingredient in food that can raise the risk of dementia by 50%.
- What is real and what is hype in the world of brain health.



Be on the lookout in your inbox for an invitation in the coming days or you can register on the team website:

<https://advisor.morganstanley.com/trailhead-retirement-planning-group>



Dan Hoffmann

The Hoffmann family is anxiously awaiting spring but enjoying winter as much as possible. A Michigan ski trip is around the corner with some of Adele's 8th grade families. Adele (14) is enjoying club volleyball. Dan and Kristin love to watch her play but try to divide and conquer with those weekend-long tournaments. Elyse (17) landed a two-week internship in Germany in March. She'll be working with kindergarten students at a Waldorf School in Munich. Her high school requires all seniors to gain work experience in a field of their choosing during this internship program. For Elyse, it's a great excuse to brush up on her German language skills. The Hoffmann family loves to spend time outdoors and visit national parks. Plans are in the works for their summer camping trip, but the photo is from their last trip to Olympic National Park in November.



Sean Lannan

With spring right around the corner, the Lannan family is looking forward to their spring break trip to Revelstoke Mountain in the Canadian Rockies to spend a week skiing (Maddie (16) also wants to try her hand at snowboarding). Then the family will head to Denver in late April for 'Family Weekend' at the University of Denver to visit Ella (18) as she finishes up her freshman year there. Outside of these two adventures, there will be a lot of lacrosse and the brief spring hockey season!



William Easom

Bill had a lovely holiday vacation with his family in Roatan, Honduras, where everyone was newly certified to scuba dive. Bill also had the chance to travel to Belize where you can see the lunch was local and fresh.

Anthony Severino

The Severinos enjoyed a family trip to Park City, UT, with friends during the school's winter break, which was a great opportunity to break-up the winter doldrums. This spring, Anthony will take over as head coach of Rocco's 10U baseball team. Greta will officially be participating in lacrosse – games and tournaments - along with competing in swim meets. Vivienne will be playing soccer with the same fall team. The family is also looking forward to the MLB season, hopeful that their beloved Cubbies will earn a spot in the playoffs this postseason! At time of writing of this, Anthony is headed to Arizona for the Black Canyon 100k - ask him about the race the next time you speak with him!

Erin Haley

Erin and Adam Haley are celebrating their 10th wedding anniversary this year. To celebrate, they are planning a trip to the islands of Greece this summer. Send your recommendations her way! The Haley kids are well into basketball season. Sully (8) is really starting to shine, especially fielding rebounds under the net. Ronan (5) and Nora (4) are both learning the game in a league focused on fundamentals and fun. Sully and Ronan had their piano recitals in February and Nora is gearing up for her big dance recital of the year. It's nonstop action and we wouldn't have it any other way!





Michael Haynes

Big news for Lydia (13), she was accepted to the class of 2029 for St. Ignatius College Prep! She is over the moon excited claiming she is going to play lacrosse, field hockey, and dance...and study, of course, too! Austin (18) has the next couple months to pick his college, the short list being Tennessee, Illinois, Penn State, Iowa, and South Carolina. In the meantime, CCHL, SHL, and State playoffs hockey will keep him busy. Picture from Senior Night in January.

William Kramer

Anna's youngest brother is getting married this spring in downtown Chicago. Liam (8) makes his communion this May, and he is looking forward to all the parties afterwards. Camille (2) is going to start potty training, so she is allowed in the big kids pool this summer. The warm weather and pool season cannot come fast enough for the Kramers!





David Iannalfo

David is thrilled to be name the newest Advisor on the Trailhead Retirement Planning Group! He rang in the New Year by traveling to Florida with friends where he enjoyed sailing, some golf, and even tried his hand at trapeze, jumping from 27 feet! He returned to Florida at the end of February to attend his grandfather’s surprise 90th birthday celebration and to catch the Boston Red Sox first spring training game against the Tampa Bay Rays. With five weddings on the calendar this year, including one in Italy, 2025 is shaping up to be just as busy as 2024!

Barbara Martin

The Martins had a wonderful holiday season with family! They started off with a trip to Italy in November! Luke (11) and Abby (8) both agreed that Rome was their favorite city! Everyone is keeping busy with their usual sports, but Luke decided he would try something different and audition for the 5th grade musical at school. He was cast as the lead role of Aladdin, and he could not be more excited! Now that the holiday rush is over, everyone is looking forward to Spring Break and some warmer weather!





Cindy Garner

Kevin and Cindy have some very exciting news – their son, Matt, got engaged! They were able to be there for the proposal and celebrate with Matt and his fiancée, Cailyn, in Park City, Utah, in December. They are in the middle of planning a June 2026 wedding in Utah. Also, Kevin will be turning 60 in April this year. Kevin and Cindy are planning a golf getaway to TPC Sawgrass in May to celebrate. Kevin is very excited. Cindy, not so much, but at least there is a beach close by!

Jack Starkey

Jack, Rachel, and Lillian (1) enjoyed their first holiday season as a family of three. Lily loved her first Christmas and celebrated her first birthday shortly after - she got everything on her wish list!

Mom and Dad had a blast on a snowboarding trip in February... even though Lily got her first snowboard for Christmas, she wasn't quite ready for the steep slopes out in Colorado and stuck to the bunny hills back home with Grandma & Grandpa.





Blake Kauffmann

2025 has started off with another big life event in the Kauffmann household! Following their wedding last October, Kaitlyn and Blake just moved into their new home! It was a long time coming, as it's been being built over the last 8 months, but they are so excited to make it their own over the years to come and continue to grow into it!



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Left to right: Cynthia Garner, Group Director; David Iannalfo, Financial Advisor; William Kramer, Financial Advisor; Michael Haynes, Financial Advisor; Dan Hoffmann, Financial Advisor; William Easom, Financial Advisor; Erin Haley, Financial Advisor; Sean Lannan, Financial Advisor; Alex Unis, Chief of Staff; Anthony Severino, Financial Advisor

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Team Members in Q1 2025 Newsletter: Dan Hoffmann, Financial Advisor, NMLS ID #1275580; Sean Lannan, Financial Advisor, NMLS ID #1270099; William Easom, Financial Advisor, NMLS ID #1265054; Anthony Severino, Financial Advisor, NMLS ID #1272513; Erin Haley, Financial Advisor, NMLS ID #1262066; Michael Haynes, Financial Advisor, NMLS ID #1275732; William Kramer, Financial Advisor, NMLS ID #1449326; David Iannalfo, Financial Advisor, NMLS ID #2675176; Barbara Martin, Business Development Associate – Vice President; Cynthia Garner, Group Director - First Vice President; Jack Starkey, Investment Consultant - Assistant Vice President; Blake Kauffmann, Investment Consultant - Assistant Vice President.

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2023-2025 Forbes Best-In-State Wealth Management Teams Source: Forbes.com (2023-2025). 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 year the award was issued, having commenced in March of the prior year. 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 <http://www.SHOOKresearch.com>.