Morgan Stanley

The Wentworth Group at Morgan Stanley

Trusted Counsel. Modern Wealth Solutions

As you become more successful and your financial world becomes more complex, careful planning and tailored advice become even more important to helping achieve your life goals.

At The Wentworth Group, we understand the challenges of managing wealth. We offer a thoughtful and thorough approach that focuses on helping you simplify your financial life. Most importantly, we make it a priority to be your advocate and trusted advisory team. We strive to empower you to be confident in your financial decisions now and as your life evolves.

Our Mission Is Simple

Our aim is to provide personalized wealth guidance that helps you achieve your goals with confidence and clarity. We address complexity by offering financial planning, skilled advice, and thoughtful investment management. Our goal is to be your primary resource for all your financial needs.

Briana Romano, Paul Kinnaly, Trent Blossom, Jenny Sideris

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Visit our website at:
https://advisor.morganstanley.com/the-wentworth-group

Paul Kinnaly, CFP®, CIMA®

Executive Director, Wealth Management
Wealth Advisor

Serving clients since 2000

Holistic wealth management, financial planning, portfolio management, and estate planning strategies.

Trent Blossom, CFP®, CPWA®, CIMA®

Financial Advisor

Serving clients since 2012

Comprehensive financial planning, new business development, multigenerational planning, and risk management.

Briana Romano

Portfolio Associate

Serving clients since 2010

Client transactions, account management, and day-to-day operations.

Jenny Sideris, CFP®

Assistant Vice President

Wealth Management Associate

Serving clients since 2000

New business development, investment management, and financial planning activities.

Our Valued Clients

We work with an extraordinary group of clients who value our depth of knowledge and experience in providing comprehensive wealth management solutions that are tailored to help achieve their short- and long-term goals. We cater to a diverse group of clients who include:

- Families spanning generations
- Self-made entrepreneurs and business owners
- Successful professionals and executives
- Retirees and individuals planning for retirement
- Referrals from existing clients and industry professionals

We are committed to delivering a concierge wealth management experience to the individuals, families and businesses we proudly serve.

Our Suite of Services

Manage Your Wealth

- Goals prioritization
- Risk assessment
- Cash flow analysis
- Life transition planning

Shape Your Retirement

- Social security and pension analysis
- Income planning and distribution
- Traditional and Roth IRAs
- 401(k) and IRA rollovers

Help Enhance Your Career

- Executive Financial Services
- Stock option planning
- Diversification of concentrated positions

Manage Risk

- Cash management
- Lending solutions
- Debt restructuring
- Life and long-term care insurance

Help Grow Your Assets

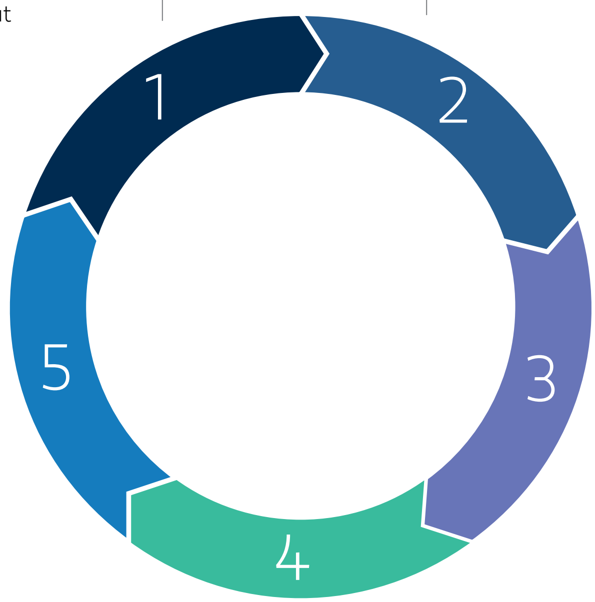
- Portfolio construction
- Open architecture platform
- Tax-efficient asset allocation
- Alternative investments

Help Preserve Your Estate

- Next generation education
- Beneficiary designations
- Collaboration with your accountant and attorney

How We Help You Achieve Your Goals

Our consultative process focuses on you and your family — where you are today and where you want to go. Working together, we develop the strategies to get you there, providing objective advice and investment insights to construct a wealth management plan that is uniquely yours.



INITIAL CONVERSATION

We begin with an informal discussion to understand your financial concerns and determine how we can add value to your situation. This is your opportunity to interview us, as we get to know you. If we agree to move forward, we'll schedule our next meeting and request important information about your finances.

FACE-TO-FACE MEETING

We continue the dialogue by fostering an in-depth conversation where we'll ask dozens of questions to learn about the values that shape your decisions. We'll review the information you've prepared and begin to define your priorities.

ANALYSIS AND STRATEGY

Here, we utilize both strategic and technical financial planning tools to develop a personalized and detailed strategy to help answer such important questions as "Can I retire comfortably?", "What is my net worth?", and "Do I have enough insurance?" This information serves as the foundation for building your initial plan, as well as future investment decisions.

COMMITMENT MEETING

In this step, we share our thoughts and recommendations intended for building and preserving your wealth. Upon your approval, we'll prepare the paperwork to execute the investment strategies, as we begin to implement the other wealth management strategies we discussed. These often encompass risk management, as well as estate and wealth planning solutions.

SERVICE, SERVICE, SERVICE

Committed to a premium client experience, we focus on developing a relationship that provides dedicated value to you and your family. Serving as your family's CFO, we want to be your first call for anything financial.

Paul A. Kinnaly, CFP®, CIMA® has been named to **Forbes Best-In-State Advisors** 2024 – 2026

Paul A. Kinnaly, CFP®, CIMA® has been included as a member of the **Master's Club** since 2021

Morgan Stanley Wealth Management Master's Club members must meet a number of criteria including performance, conduct and compliance standards, revenue, length of experience and assets under supervision. Master's Club membership is no guarantee of future performance.

2024 – 2026 Forbes America's Top Wealth Advisors and Best-In-State Wealth Advisors

Source: Forbes.com (Awarded 2024 – 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 or June of the year prior to the issuance of the award, having commenced in March or June of the previous year. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ratings. These rankings are based on in-person and telephone due diligence meetings to evaluate each 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 these rankings may not be representative of any one client's experience. These rankings are not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research or Forbes. For more information, see www.SHOOKresearch.com.

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 CRC 5491605 05/2026 CS 2530695-7261076 06/26