

Complimentary Financial Consultations with Morgan Stanley

The Morgan Stanley at Work team is pleased to provide you with resources, education and guidance to help you manage your financial life.

In an effort to help you build personal financial plans, we are offering you the opportunity to have a complimentary 30-minute virtual meeting with a Morgan Stanley Financial Advisor to discuss your situation, ask questions and get started on the path to building financial strategies personalized to your needs.

Please note, these sessions are intended to serve as a broad discussion about your personal finances rather than to provide complex financial advice or financial strategies plans. All discussions are strictly confidential.

Commonly Discussed Topics Include:

- Strategies for equity compensation
- Ways to manage everyday finances
- Advice on how to achieve personal financial goals (e.g., saving for college, planning for retirement, paying down debt, purchasing a home)
- How to build and protect personal wealth (e.g., trust and estate planning)
- Charitable giving
- Socially responsible investing
- Morgan Stanley investing solutions (from self-service to full-service)

To make your session as productive as possible, you might consider bringing the following:

- Details on your household income and expenses
- List of your financial accounts and approximate balances (e.g., checking, savings, 401(k), IRA, investments, education savings, insurance policies)
- List of your short- and long-term financial goals



If you currently have a Morgan Stanley Financial Advisor, please reach out to them to schedule an appointment. If not, please click here and an advisor will contact you to schedule a consultation.

Disclosures:

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors and Private Wealth Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.