Morgan Stanley

OVERVIEW

Morgan Stanley Private Wealth Management (PWM) serves highly affluent and multigenerational families by offering custom advice, a personalized approach, and first-class service. The goal is to preserve and grow clients' financial, family, and social capital to have the greatest positive impact today and for generations to come.

Website Access	Contact Point	Geographic Focus	HQ Location
[Website Access]	Marty Dutch Marty.Dutch@morganstanley.com	**Global**	**Broadway, NYC**

Thematic Priorities / Services Offered

Investment strategies	*Tailored investment approaches that adapt to clients' needs and market conditions.*
Wealth Management	*They provide comprehensive wealth management services designed to address the unique circumstances of Ultra-High-Net-Worth (UHNW) clients.*
Financial Innovation	*Engages in innovative investment strategies and approaches, including thematic and alternative investments.*
Family governance	*The firm commits to addressing family dynamics and succession planning*
Risk Management	*A critical component of their service offerings is ensuring clients' financial security against various risks.*
Philanthropy Management	*Helping clients navigate charitable giving and legacy planning effectively.*

Main Engagement / Stakeholders

- UHNW Individuals and Families: Their main clientele requires bespoke financial solutions.
- Next Generation Family Members: Empowering younger generations to carry on family legacies and values.
- Subject Matter Experts: Accessing resources and experts within the firm to address specific client needs.