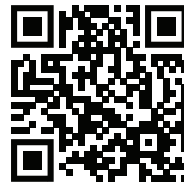


JORDAN

Morgan Stanley Financial Advisor taking her practice to the next level.

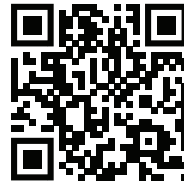
Morgan Stanley Financial Advisors use a broad toolkit of proprietary solutions to attract, nurture and grow client relationships. LeadIQ intelligently pairs Jordan with prospective clients, Genome informs her engagement approach by promoting relevant content, products and services. Next Best Action enables client outreach with top ideas.



Alternate Investments



Financial Planning



Goals Planning System



Scan to watch Jordan's journey

Disclosures:
Some experiences and features shown in this experience are not currently available for clients. Such features are estimated to launch within the next 1-3 years.

The material provided by Morgan Stanley or any of its direct or indirect subsidiaries is for educational purposes only and is not an individualized recommendation. This information neither is, nor should be construed as, an offer or a solicitation of an offer, or a recommendation, to buy, sell, or hold any security, financial product, or instrument discussed herein, or to open a particular account or to engage in any specific investment strategy.

Morgan Stanley Smith Barney LLC (Morgan Stanley), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. This material was not intended or written to be used, and it cannot be used, for the purpose of avoiding tax penalties that may be imposed on the taxpayer. Clients should consult their tax advisor for matters involving taxation and tax planning, and their attorney for matters involving trusts, estate planning, charitable giving, philanthropic planning and other legal matters.

Morgan Stanley offers a wide array of brokerage and advisory services to its clients, each of which may create a different type of relationship with differing obligations to you. Please visit us at www.morganstanley.com/wealth or consult with your Morgan Stanley Financial Advisor to read about these differences.

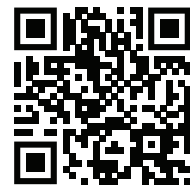
Cash management and lending products and services are provided by Morgan Stanley Smith Barney LLC, Morgan Stanley Private Bank, National Association or Morgan Stanley Bank, N.A, as applicable.

Securities products and services offered by E*TRADE Securities LLC, member SIPC, a subsidiary of Morgan Stanley.

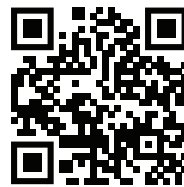
Morgan Stanley at Work services are provided by Morgan Stanley Smith Barney LLC, member SIPC, and/or its affiliates, all wholly owned subsidiaries of Morgan Stanley.

© 2022 Morgan Stanley Smith Barney LLC. Member SIPC.

CRC 4778935 (06/22)



Intelligent Withdrawals



Next Best Action Platform



Total Tax 365



Wealth Management Advice Capabilities

Morgan Stanley CONNECTED CLIENT JOURNEY

A category-redefining ecosystem of solutions empowering clients across all stages of wealth creation.



Scan to watch Sasha's journey



Equity Award Analysis



Financial Planning



Lending Solutions

CAMERON

Workplace participant coming into wealth as her employer goes public.

Morgan Stanley's workplace solutions serve companies of all sizes - from formation to Fortune 500, which presents the opportunity to engage employees who work for those companies. Morgan Stanley helps Cameron realize the value of her equity compensation with access to personalized equity education, private market liquidity solutions, and proprietary tools like Equity Award Analysis.



Scan to watch Cameron's journey

GREG

Executive nearing retirement looking for unique investment solutions he can't get elsewhere.

Morgan Stanley is uniquely positioned to support clients with managing the complexities of wealth. Clients receive access to proprietary tools and investment solutions you cannot find elsewhere. Greg's Private Wealth Advisor builds his financial plan and proposed investment solutions with Total Tax 365 and direct index products, powered by Parametric. Greg also gains access to the largest alternative investment platform and manages risk with tools like the Portfolio Risk Platform.



Scan to watch Greg's journey

SASHA

Self-directed investor looking for guidance to manage market volatility and his growing family.

Since E*TRADE and Morgan Stanley joined forces, self-directed traders like Sasha have access to Morgan Stanley research and solutions. As Sasha's life grows more complex, a Virtual Financial Advisor meets him where he is on his journey. Morgan Stanley Virtual Advisor makes advice accessible via a goals-based planning approach and customized portfolios, supported by the firm's deep advisory experience.



E*TRADE Platform



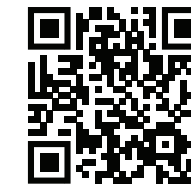
Lending Solutions



Total Wealth View



Alternative Investments



Direct Indexing



Portfolio Risk Management



Total Tax 365