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

Intelligent Withdrawals

Next Best Action Platform

Total Tax 365

Wealth Management Advice Capabilities

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.

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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

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

Equity Award Anaylsis

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

Alternative Investments

Direct Indexing

Portfolio Risk Management

Total Tax 365