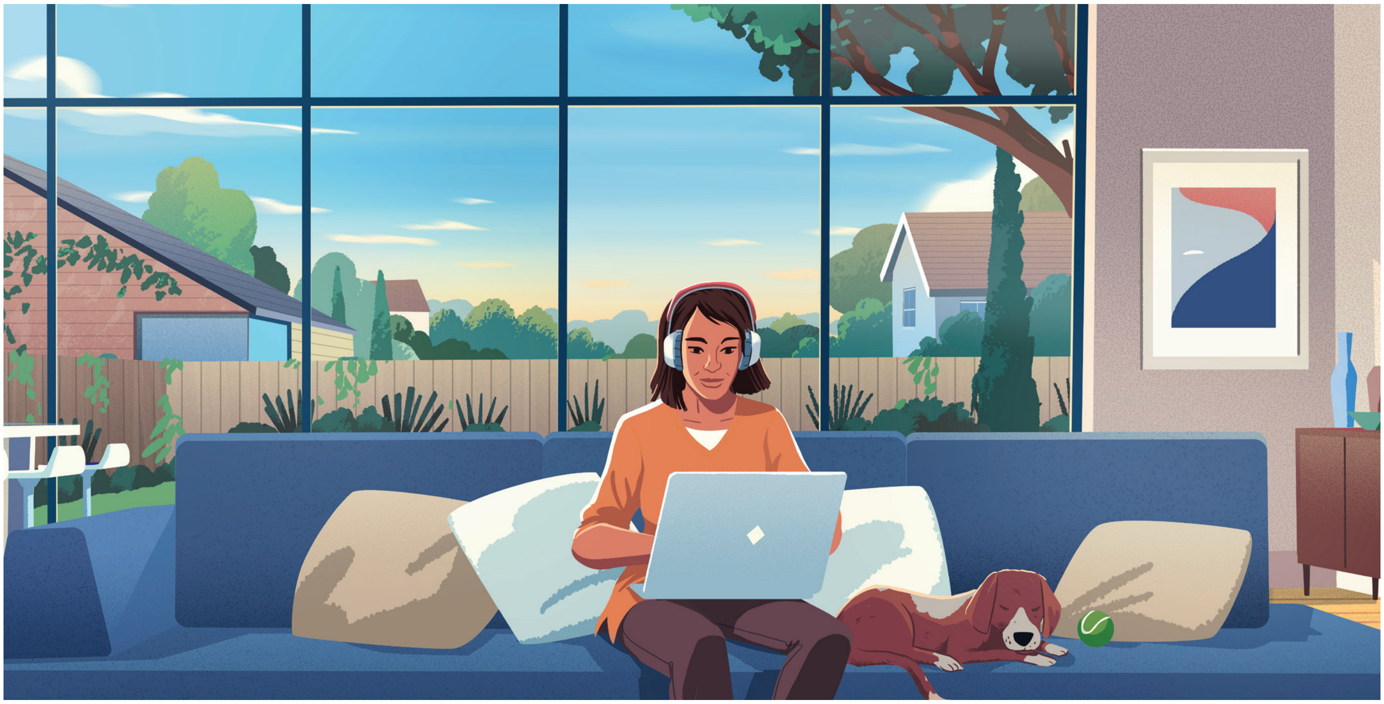
Morgan Stanley
**AT WORK**



# Upcoming Tax Webinars

## For U.S. Participants

It's never too early to start thinking about taxes! Join us for a series of webinars on year-end tax considerations and strategies for the new year.

The tax decisions you make today could possibly help you save for years to come. Considering these strategies as part of your investment process—optimizing tax savings, building wealth, and maximizing the impact of your giving—can help increase potential returns and pursue your financial goals.

### Tax Considerations for Year-End 2024

Tax Day may still be months away, but today's decisions can potentially impact this year's return. This session will cover tax-aware tactics to keep in mind as the year comes to a close.

**Click here to register**

| | |
|---|---|
| November 14 | 2:00 p.m. ET |
| November 21 | 2:00 p.m. ET |

# Preparing for Your 2024 Tax Filing (for U.S. Morgan Stanley at Work Stock Plan Participants)

Equity compensation can be one of the most valuable benefits offered by your company, but it's important to understand how it works—and how it's taxed. One of the keys to successfully building wealth over time is making sure you're able to retain much of what you earn—and that requires paying attention to the tax impact of all your financial decisions.

## Register today.

**Click here to register if you have Employee Stock Purchase Plan (ESPP) shares**

| | |
|---|---|
| February 4 | 4:00 p.m. ET |
| February 18 | 12:00 p.m. ET |
| March 4 | 4:00 p.m. ET |
| March 18 | 12:00 p.m. ET |

**Click here to register if you have Employee Stock Purchase Plan (ESPP) and Restricted Stock Units (RSUs) shares**

| | |
|---|---|
| February 5 | 4:00 p.m. ET |
| February 19 | 12:00 p.m. ET |
| March 5 | 4:00 p.m. ET |
| March 19 | 12:00 p.m. ET |

**Click here to register if you have Stock Options and/or Restricted Stock Units (RSUs) shares**

| | |
|---|---|
| February 6 | 4:00 p.m. ET |
| February 20 | 12:00 p.m. ET |
| March 6 | 4:00 p.m. ET |
| March 20 | 12:00 p.m. ET |

## Tax-Aware Strategies for 2025

Taking advantage of beneficial tax strategies can be a useful tool. This seminar highlights tax-aware strategies for individuals to consider when building their financial plans, including gifting, investing and saving.

**Click here to register**

| | |
|---|---|
| February 13 | 2:00 p.m. ET |
| March 13 | 2:00 p.m. ET |