

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

July 16th, 2024

**Cameron A McCarthy (CRD #: 6345907)**

Group:	Defined Contribution & Collective Fund Subcommittee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

This brochure supplement provides information about **Cameron A McCarthy** that supplements the applicable Morgan Stanley Smith Barney LLC ("Morgan Stanley") ADV brochure. You should have received a copy of that brochure. Please contact your Financial Advisor or Private Wealth Advisor if you did not receive Morgan Stanley's brochure or if you have any questions about the contents of this supplement.

Additional information about Cameron A McCarthy is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

This section states the Investment Professional's formal education after high school, business background for the last five years and certain professional designations.

Name:	Cameron A McCarthy (b. 1994)
Education:	B.S. in Finance from Bentley University
Business Background (Past 5 Years):	10/2021 – Present, Executive Director, Head of OCIO Retirement & Government Solutions, Morgan Stanley Wealth Management 03/2020 – 09/2021 Fixed Income Portfolio Manager, Mercer Investments (Principal/Senior Associate) 08/2019 – 03/2020 Senior Associate, Mercer Investments 04/2018 – 08/2019 Associate, Mercer Investments
Professional Designations:	N/A

### Disciplinary Information

This section describes certain legal or disciplinary events that may be material to your evaluation of the Investment Professional, generally within the last ten years (e.g., certain findings by regulators in administrative proceedings, customer disputes, and criminal charges). Investment Professionals are required to comply with all applicable rules and regulations. They are also subject to internal policies and procedures under which they commit to working with integrity and high ethical standards at Morgan Stanley. However, Investment Professionals may have been subject to legal or disciplinary events and certain types of these events are disclosed in this section.

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No material legal or disciplinary events to disclose.

### Other Business Activities

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#### Investment-Related Businesses

Morgan Stanley is a registered broker-dealer. The Investment Professional is a registered representative of Morgan Stanley (in its capacity as a broker-dealer). Morgan Stanley is also a registered investment adviser. Morgan Stanley is qualified to offer you not only investment advisory products and services through advisory accounts, but also various other investment products and services through brokerage accounts.

#### Compensation for Investment Professionals

The Investment Professional may be eligible for additional incentive compensation above his or her base salary. Incentive compensation is discretionary but is determined based on a range of factors including the Investment Professional's individual performance. Regardless of individual performance, Morgan Stanley management may award reduced incentive compensation or no incentive compensation at all if, for example, the Investment Professional did not meaningfully contribute to the bottom-line result or market conditions dictate a reduction in incentive compensation. Incentive compensation may be paid in the form of cash or equity, consistent with various Morgan Stanley compensation programs.

#### Other Business Activities

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No additional business activities to disclose.

#### Additional Compensation

No additional compensation to disclose.

### Supervision

This section describes how Morgan Stanley monitors the work conducted by the Investment Professional and identifies the person supervising the Investment Professional's activities. For Core Market Fiduciary Program accounts, for which the Committee makes investment decisions, the client's Financial Advisor or Private Wealth Advisor regularly reviews the client's account with the client.

Your Financial Advisor or Private Wealth Advisor and his or her supervisor are responsible for ensuring that the Core Market Fiduciary Program is suitable for you. Please see your Financial Advisor's or Private Wealth Advisor's brochure supplement for more details.

Supervisor:	Andre Rosas, Chief Operating Officer for PIMS & Head of OCIO / MSFO IO Client Solutions
Supervisor Tel:	+1 (212) 761-1976

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

July 16th, 2024

### Eumene D Lee (CRD #: 7433003)

Group:	Defined Contribution & Collective Fund Subcommittee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about Eumene D Lee is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

#### Educational Background and Business Experience

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Name:	EUMENE D LEE (b. 1983)
Education:	BACHELOR OF MATHAMATICS/ACTUARIAL SCIENCE FROM UNIVERSITY OF WATERLOO (ON, CANADA)
Business Background (Past 5 Years):	10/2021 – Present, Executive Director, Head of OCIO Defined Benefit Portfolio Solutions, Morgan Stanley Wealth Management 09/2019 – 09/2021 Research Consultant, NEPC 10/2013 – 09/2019 Financial Strategist, Mercer Investments (Senior Associate)
Professional Designations:	N/A

#### Disciplinary Information

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#### Other Business Activities

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##### Investment-Related Businesses

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##### Other Business Activities

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No additional business activities to disclose.

##### Additional Compensation

No additional compensation to disclose.

#### Supervision

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Supervisor:	Cameron McCarthy, Head of OCIO Retirement & Government Entities
Supervisor Tel:	+1 212 762-2230

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

July 16th, 2024

**KEVIN EDWARD KOPCZYNSKI (CRD #: 2050158)**

Group:	Defined Contribution & Collective Fund Subcommittee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about KEVIN EDWARD KOPCZYNSKI is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

This section states the Investment Professional's formal education after high school, business background for the last five years and certain professional designations.

Name:	KEVIN EDWARD KOPCZYNSKI (b. 1965)
Education:	Haverford College (Bachelor of Arts)
Business Background (Past 5 Years):	06/01/2009 – Present, Executive Director, Head of OCIO Taft-Hartley & Government Solutions, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	<b>Chartered Financial Analyst® or CFA®</b> The CFA® designation is conferred by the CFA Institute to individuals who demonstrate knowledge of certain investment principles and meet professional conduct requirements. To receive authorization to use the designation, a candidate must meet the following criteria: (1) hold an undergraduate degree (or equivalent, as assessed by the CFA Institute); (2) have four years of acceptable professional work experience involving the investment decision-making process, supervising persons who practice such activities, or teach such activities; (3) study for and successfully complete three exams that test the academic portion of the CFA® program; and (4) pay an annual membership fee. Exam areas of focus include principles and concepts that apply to investment analysis, valuation, and portfolio management. Candidates seeking a CFA® designation must also become a member of the CFA Institute, agree to the CFA Institute's Code of Ethics and Standards governing a candidate's professional conduct on an annual basis, and apply for membership to a local CFA® member society.

### Disciplinary Information

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No material legal or disciplinary events to disclose.

### Other Business Activities

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#### Investment-Related Businesses

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#### Compensation for Investment Professionals

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#### Other Business Activities

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\*380941- Estate; Investment related: No; New York, NY; Executor; Sep 2019; During business hours: 0; After business hours: 2

\*555217 – Trust; Investment related: Yes; Harrison, New York; 05/2023; During business hours: 0; After business hours: 10

#### Additional Compensation

No additional compensation to disclose.

### Supervision

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Supervisor:	Cameron McCarthy, Head of OCIO Retirement & Government Entities
Supervisor Tel:	+1 212 762-2230

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

July 16th, 2024

**Marc Dichek (CRD #: 3097752)**

Group:	Defined Contribution & Collective Fund Subcommittee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about Marc Dichek is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

This section states the Investment Professional's formal education after high school, business background for the last five years and certain professional designations.

Name:	Marc Dichek (b. 1976)
Education:	BINGHAMTON UNIVERSITY (BACHELOR OF ARTS)
Business Background (Past 5 Years):	03/01/2018 – Present, Executive Director, OCIO Taft-Hartley & Government Solutions, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	<b>Chartered Financial Analyst® or CFA®</b> The CFA® designation is conferred by the CFA Institute to individuals who demonstrate knowledge of certain investment principles and meet professional conduct requirements. To receive authorization to use the designation, a candidate must meet the following criteria: (1) hold an undergraduate degree (or equivalent, as assessed by the CFA Institute); (2) have four years of acceptable professional work experience involving the investment decision-making process, supervising persons who practice such activities, or teach such activities; (3) study for and successfully complete three exams that test the academic portion of the CFA® program; and (4) pay an annual membership fee. Exam areas of focus include principles and concepts that apply to investment analysis, valuation, and portfolio management. Candidates seeking a CFA® designation must also become a member of the CFA Institute, agree to the CFA Institute's Code of Ethics and Standards governing a candidate's professional conduct on an annual basis, and apply for membership to a local CFA® member society.

### Disciplinary Information

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No material legal or disciplinary events to disclose.

### Other Business Activities

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#### Investment-Related Businesses

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No additional business activities to disclose.

#### Additional Compensation

No additional compensation to disclose.

### Supervision

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Supervisor:	Kevin Kopczynski, Head of OCIO Taft-Hartley & Government Solutions
Supervisor Tel:	+1 (914) 225-9667

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

July 16th, 2024

### SUKRU SAMAN (CRD #: 5179038)

Group:	Defined Contribution & Collective Fund Subcommittee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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#### Educational Background and Business Experience

This section states the Investment Professional's formal education after high school, business background for the last five years and certain professional designations.

Name:	SUKRU SAMAN (b. 1972)
Education:	B.S. in Computer Engineering from Bogazici University in Istanbul and M.S. in Finance from George Washington University
Business Background (Past 5 Years):	2009 – Present, Executive Director, Head of OCIO / MSFO IO Liquid Market Solutions, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	Chartered Financial Analyst (CFA), Chartered Alternative Investment Analyst (CAIA), and Financial Risk Manager (FRM)

#### Disciplinary Information

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SSNIE LLC; Investment related No; Directing Investment; Role/position/job title (proprietor, partner, officer, director, employee, trustee, agent).  
Apr/2018; During business hours: 0; After business hours: 0; Managing member directing investment.

##### Additional Compensation

No additional compensation to disclose.

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Supervisor:	Brandon Dees, Head of OCIO/ MSFO IO Alternative Investment Solutions
Supervisor Tel:	+1 212 762-1321