Morgan Stanley

FORM ADV BROCHURE SUPPLEMENT

May 5, 2022

Tom Williams (CRD #: 4773501)

<table>
<thead>
<tr>
<th>Group:</th>
<th>Outsourced Chief Investment Office (OCIO) Investment Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>2000 Westchester Avenue Purchase, NY 10577-2530</td>
</tr>
<tr>
<td>Investment Professional Tel:</td>
<td>(800) 223-2440</td>
</tr>
<tr>
<td>Corporate Address:</td>
<td>Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530</td>
</tr>
<tr>
<td>Corporate Tel:</td>
<td>(914) 225-1000</td>
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Additional information about Tom Williams is available on the SEC's website at 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: Tom Williams (b. 1969) |
| Education: B.A. in Economics from Trinity College-Hartford, JD in Law from USC Gould School of Law. |
| Business Background (Past 5 Years): |

- 01/2020 - 06/2020, CIO and Managing Member of BlueGreen Capital Management
- 06/2020 - Present, Managing Director and Head of Institutional Portfolio Solutions and Outsourced Chief Investment Office (OCIO) within the Global Investment Office

| Professional Designations: |
| Chartered Financial Analyst (CFA) Charterholder. |

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

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Compensation for Investment Professionals

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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.

Each Investment Professional reports to a supervisor who has supervisory responsibility for the Investment Professional's work. The Investment Solutions Committee (of which the Investment Professional is a member) makes decisions by a vote of its members. The Committee's investment decisions are then implemented in client accounts. In the Select UMA program (Firm Discretion), the Consulting Group (a Morgan Stanley business unit) reviews performance and dispersion of accounts to check whether accounts are invested in accordance with the Committee's decisions. For Outsourced Chief Investment Office (OCIO) 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. In the TRAK CGCM program, the fund board oversees investment activities.

Your Financial Advisor or Private Wealth Advisor and his or her supervisor are responsible for ensuring that particular investment advice given to you is suitable for you. Please see your Financial Advisor's or Private Wealth Advisor's brochure supplement for more details.

For Morgan Stanley Access Investing, our proprietary algorithms and analytics recommend a suitable investment strategy based upon information the client provided and monitor client accounts for drift from a strategy's recommended asset allocation to determine when it is appropriate to rebalance.

Supervisor: Lisa Shalett
Supervisor Tel: +1 (212) 296-0335
Supervision

Other Business Activities

Disciplinary Information

Educational Background and Business Experience

No additional compensation to disclose.

Additional Compensation

No additional business activities to disclose.

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Supervisor: Tom Williams
Supervisor Tel: +1 (914) 225-1090

Morgan Stanley

FORM ADV BROCHURE SUPPLEMENT

May 5, 2022

SUZANNE ELLEN LINDQUIST (CRD #: 2277322)

Group: Outsourced Chief Investment Office (OCIO)
Investment Committee
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) 225-1090

This brochure supplement provides information about SUZANNE E LINDQUIST 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 SUZANNE E LINDQUIST is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

| Name: SUZANNE E LINDQUIST (b. 1963) |
| Education: UNIVERSITY OF MARYLAND (BACHELOR OF SCIENCE) |
| Business Background (Past 5 Years): 2014 – PRESENT, MORGAN STANLEY WEALTH MANAGEMENT |
| Professional Designations: N/A |

Disciplinary Information

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Other Business Activities

This section provides information on businesses or occupations in which the Investment Professional is involved, including registrations and other business interests. It also describes the type of compensation received by Investment Professionals.

Investment-Related Businesses

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Compensation for Investment Professionals

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Other Business Activities

The Investment Professional may also be involved in other business activities. Any activities listed below have been approved by Morgan Stanley managers and may involve a substantial source of the Investment Professional’s income or involve a substantial amount of the Investment Professional’s time. Approval for these activities is granted only after managers consider, among other things, whether the activity would create an actual or potential conflict of interest, whether the time and effort involved may compromise the Investment Professional’s ability to perform his or her job, and whether the activity is likely to evolve from an acceptable activity to an unacceptable one.

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No additional business activities to disclose.

Additional Compensation

No additional compensation to disclose.

FORM ADV BROCHURE SUPPLEMENT

May 5, 2022
Brian Mulley (CRD #: 4165876)

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Additional information about Brian Mulley is available on the SEC’s website at www.adviserinfo.sec.gov.

**Educational Background and Business Experience**

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<table>
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<tr>
<th>Name:</th>
<th>Brian Mulley (b. 1977)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education:</td>
<td>B.S. in Finance from University of Massachusetts Lowell</td>
</tr>
<tr>
<td>Professional Designations:</td>
<td>N/A</td>
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**Disciplinary Information**

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**Additional Compensation**

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<th>Supervisor:</th>
<th>Tom Williams</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor Tel:</td>
<td>+1 (212) 296-6860</td>
</tr>
</tbody>
</table>

FORM ADV BROCHURE SUPPLEMENT

May 5, 2022

KEVIN KOPCZYNSKI (CRD #: 2050158)

<table>
<thead>
<tr>
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<tr>
<td>Address:</td>
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Additional information about KEVIN E KOPCZYNSKI is available on the SEC's website at www.adviserinfo.sec.gov.

**Educational Background and Business Experience**

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<table>
<thead>
<tr>
<th>Name: KEVIN KOPCZYNSKI (b. 1965)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education: HAVERTOWN COLLEGE (BACHELOR OF ARTS)</td>
</tr>
<tr>
<td>Business Background (Most 5 Years): 06/01/2009 – PRESENT, MORGAN STANLEY SMITH BARNEY, EXEC DIR, PORTFOLIO MANAGEMENT</td>
</tr>
<tr>
<td>Professional Designations: Chartered Financial Analyst® or CFA®</td>
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**Additional Compensation**

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<tr>
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**FORM ADV BROCHURE SUPPLEMENT**

May 5, 2022

Zachary Aposian (CRD #: 5108226)

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<tr>
<th>Name</th>
<th>Zachary Apoian (b. 1979)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>B.S. in Mathematics, Physics, and Management Science from Massachusetts Institute of Technology (MIT).</td>
</tr>
<tr>
<td>Business Background (Past 5 Years)</td>
<td>05/2014 – Present, Executive Director of OCIO &amp; Head of Portfolio Implementation.</td>
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