Morgan Stanley

Private Wealth Management

A division of Morgan Stanley Smith Barney

Getting Started

PWM Portfolio Information

Access Your Account Information at Any Time, from Anywhere You Have Internet Access

Private Wealth Management (PWM) Portfolio Information provides you with Internet access to your Morgan Stanley account(s). Whether you are in the office, at home, or on the road, you can access your account information at anytime, from anywhere. Updated daily, your Portfolio Information service allows you to monitor your portfolio holdings, view transactions, customize reports, create consolidated account groups, and review monthly statements.

The PWM Portfolio Information Home Page

When you access your Portfolio Information, your Personal Home Page displays an overview of your investments and activity. You can review your security and asset allocation along with your account performance. You can also view intraday market value changes and access market data and research.

View portfolio reports, statements, create your own account groups, or rename accounts here.

Access up-to-date research.

View month-to-date and year-to-date portfolio summary information

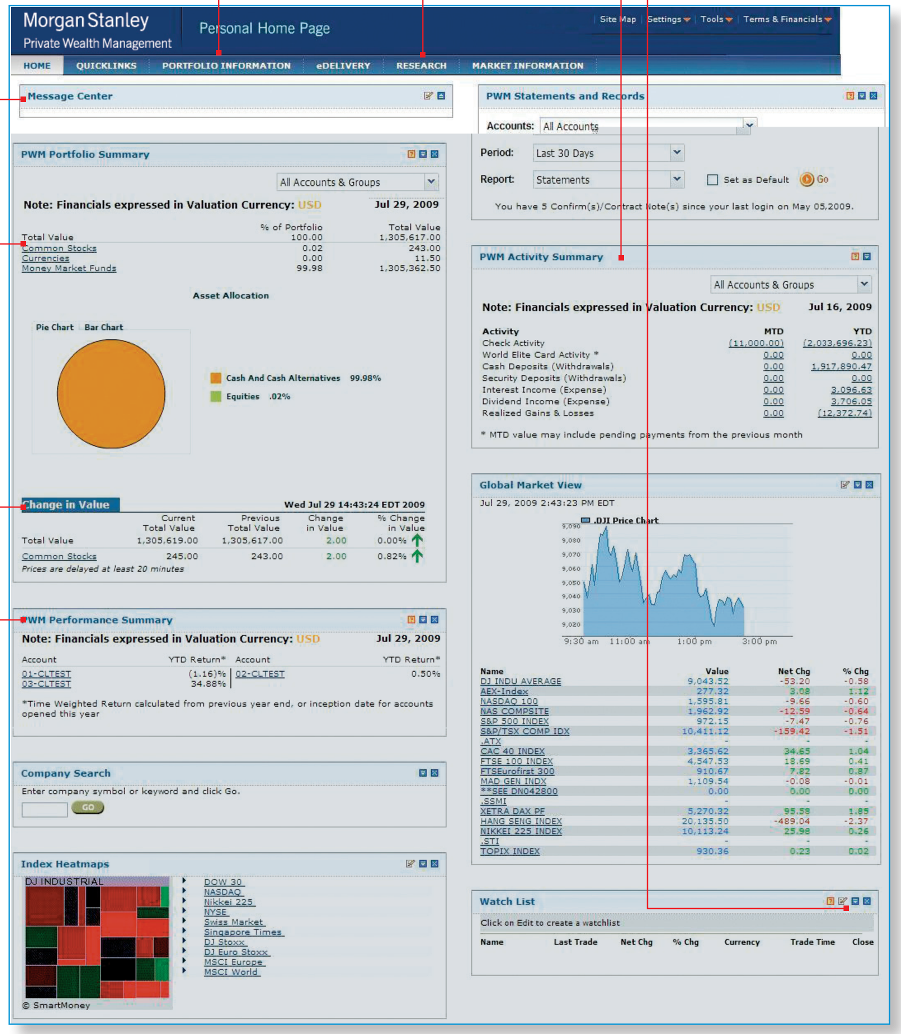
To view or create a "watchlist", click Notepad icon.

Access PWM specific messages here.

View details of your holdings by clicking the specific links.

Portfolios are priced intraday from NASDAQ, NYSE, and AMEX. To refresh prices, reload the Personal Home Page.

View year-to-date account performance

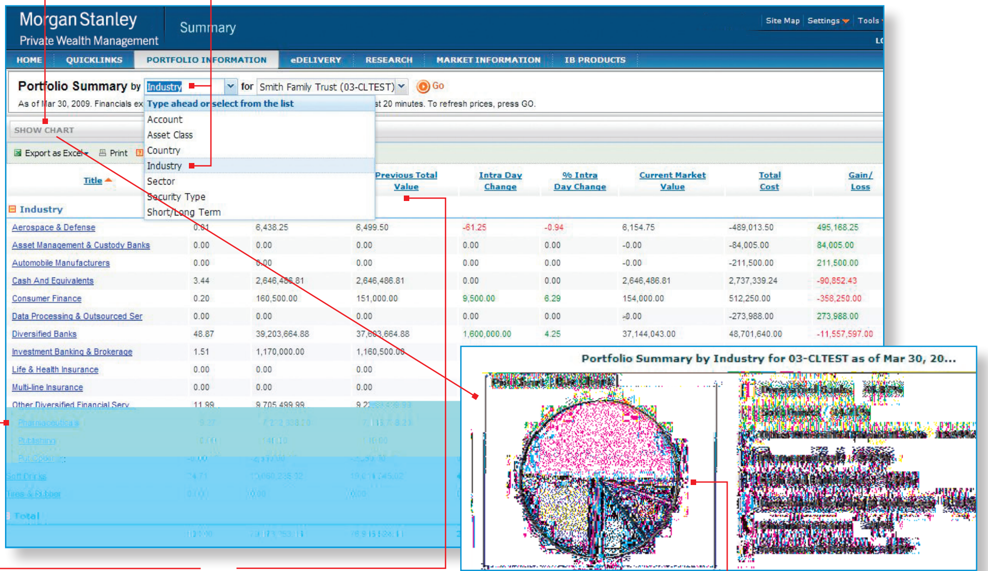


Monitor Your Portfolio

The PWM Summary screen provides a comprehensive overview of your portfolio that enables you to generate reports grouped by account, asset class, country, short/long-term gains or losses, industry, sector, and security type.

Export your report to Excel. There's also a Print option for convenient printing.

Filter by account or group and type of portfolio view, then click Go.



To view detailed positions, click a link.

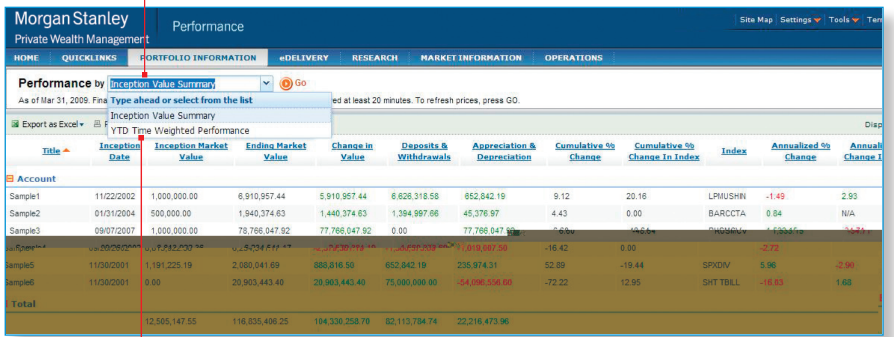
Click any column heading to sort the report by that column. Click twice to reverse the sort order.

Display a pie chart of the report.

Monitor Your Performance

The Performance screen summarizes your performance since inception or year-to-date against your portfolios' benchmarks.

Inception value summary report.



Year-to-date weighted performance report.

View Your Account Details

The PWM Holdings screen provides you with detailed information on your individual holdings. You can summarize positions on a consolidated level or by each individual purchase date.

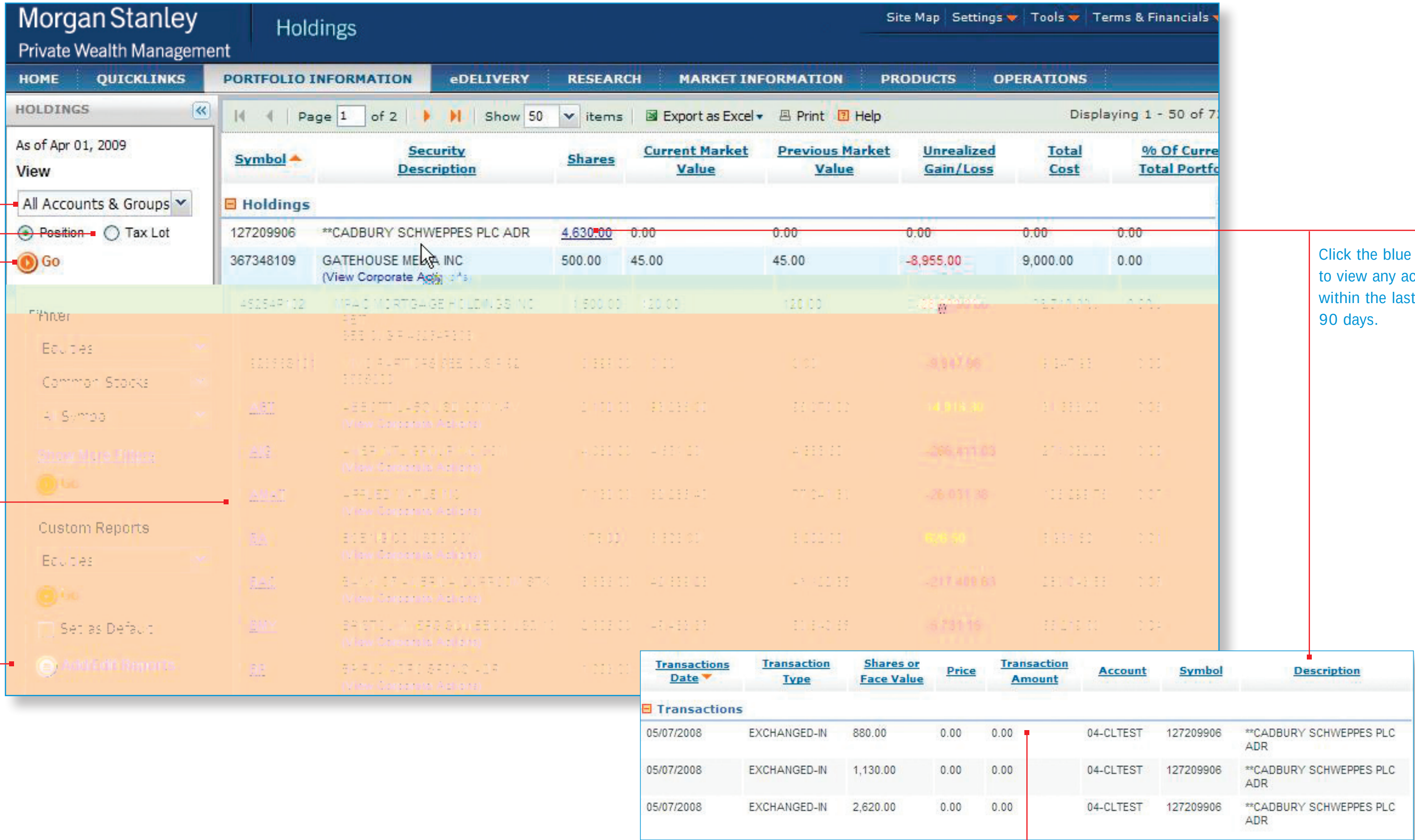
Filter by account or account groups.

View your holdings by positions or tax lot.

To refresh the report with intraday prices, click Go.

To view the most recent research on an individual security, click on that security.

Customize an existing report or create a new one (for details, see next page).



Click the blue link to view any activity within the last 90 days.

Recent transactions.

Customize Your Reports

To assist in the analysis of your holdings, you can create new reports or customize existing ones by adding or removing report columns. You can save the format of your report and generate it again at anytime.

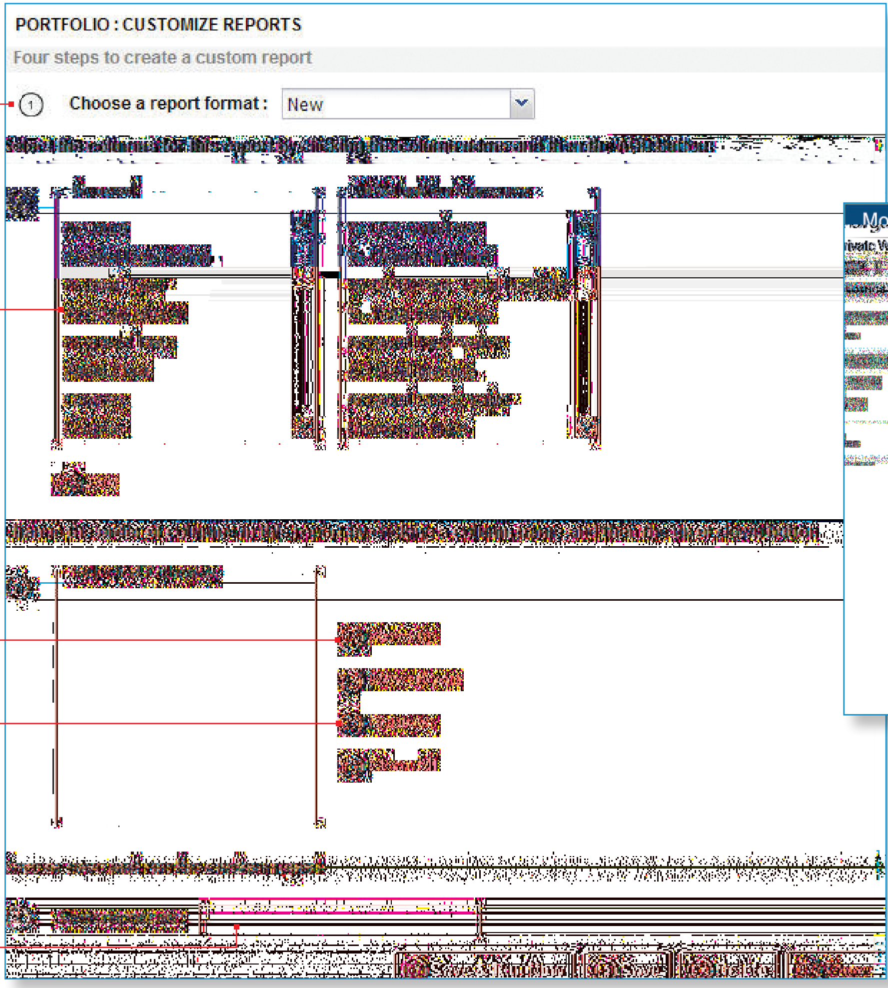
Create a new report, or customize an existing one and save it under a new name.

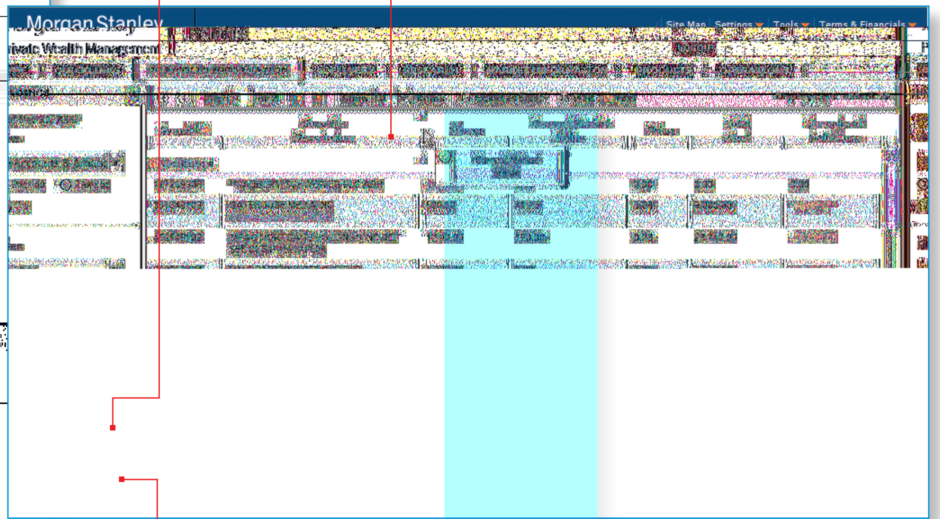
Select the field(s) you want to appear in the report, then click Add. To select more than one at a time in a category, hold down the Ctrl key.

To change the sequence in which the column appears, select the field and move it up or down.

To remove one or more fields from a report, select the field and click Remove.

To save the customized report format, type in a name here.





The name of your customized report appears here.

The fields you specified appear in the report in the positions you specified.

Make this report your default for Holdings.

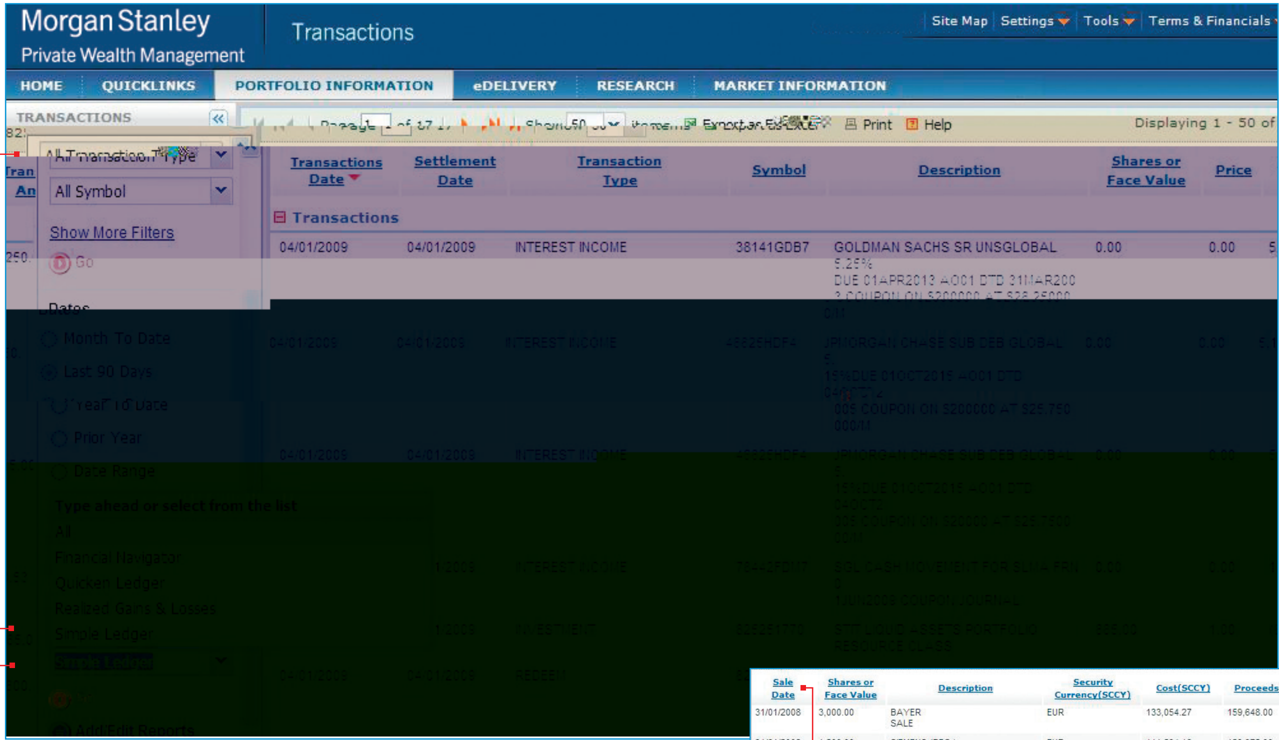
View Your Transactions

The PWM Transactions screen presents a complete accounting of all the activity in your portfolio for the last 2 years. You can view your transactions by account, asset class, country, ticker symbol, security type, and transaction type. The transaction screen also provides access to realized gains and losses.

Search your transactions by selecting a category from the View menu.

Select the report format.

Simple-ledger format.



Realized-gains-and-losses format.

Sale Date	Shares or Face Value	Description	Security Currency(SCCY)	Cost(SCCY)	Proceeds(SCCY)	Cost	Proceeds	Currency Gain/Loss	Market Gain/Loss(SCCY)	Market Gain/Loss	Total Gain/Loss
31/01/2008	3,000.00	BAYER SALE	EUR	133,054.27	159,648.00	172,558.28	237,516.31	25,393.21	26,593.73	39,564.82	64,958.03
31/01/2008	1,500.00	SIEMENS (REG.) SALE	EUR	111,534.18	129,975.00	145,032.95	193,370.31	20,902.03	18,440.82	27,435.33	48,337.36
31/01/2008	5,000.00	TNT SALE	EUR	117,875.51	125,305.00	155,565.40	186,422.51	19,803.89	7,429.49	11,053.22	30,857.11
31/01/2008	3,400.00	TOTAL SALE	EUR	148,912.80	166,668.00	190,287.93	247,960.32	31,257.09	17,755.20	26,415.30	57,672.39
31/01/2008	1,290.00	E.ON SALE	EUR	105,722.36	163,623.60	131,691.91	243,431.01	25,596.53	57,901.24	86,142.57	111,739.10
19/02/2008	9,746.00	VERIZON COMMUNICATIONS SALE	USD	390,778.36	357,889.08	390,778.36	357,889.08	0.00	-32,889.28	-32,889.28	-32,889.28

Clicking any column sorts the report by that column.

View Your Monthly Statements

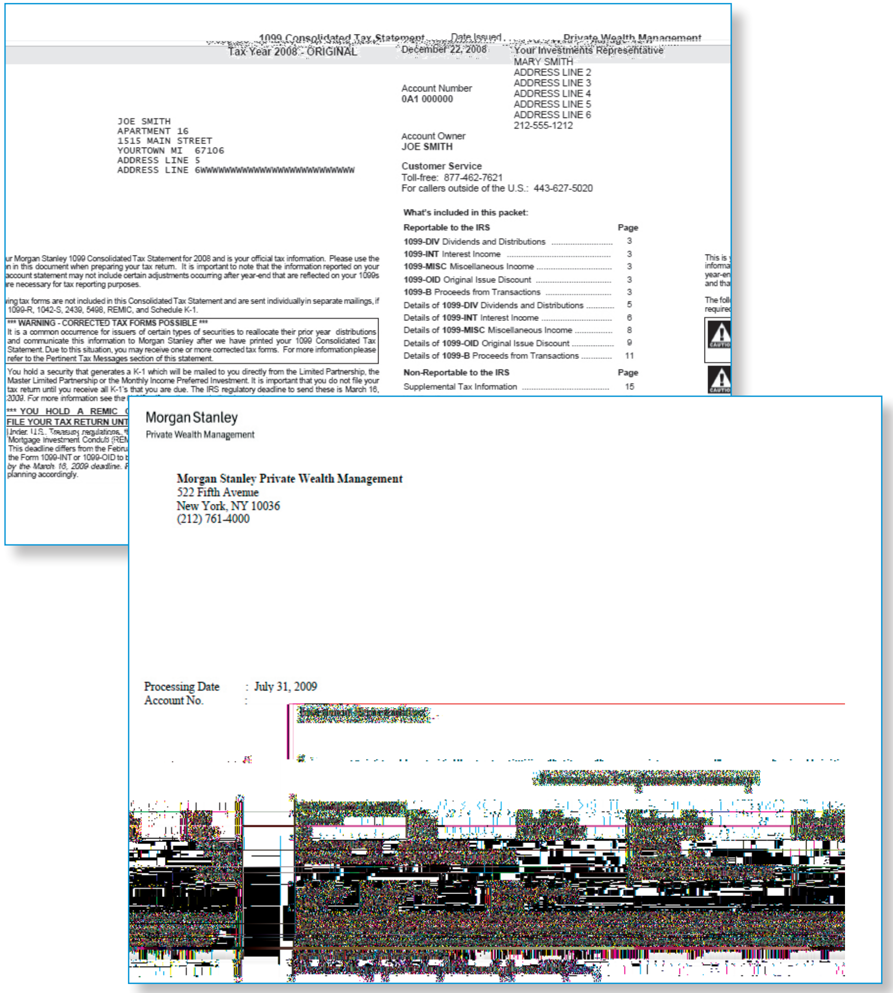
Our Comprehensive Statements and Records service provides access to monthly statements, trade confirms and 1099 forms. You can also elect to receive statements exclusively online and reduce mail delivery through our eDelivery service.

To display a statement, click on the account. To open the statement in a separate window, right-click and choose Open in New Window.

Select the statement type and period; then click Go.

Click View to access your monthly statement

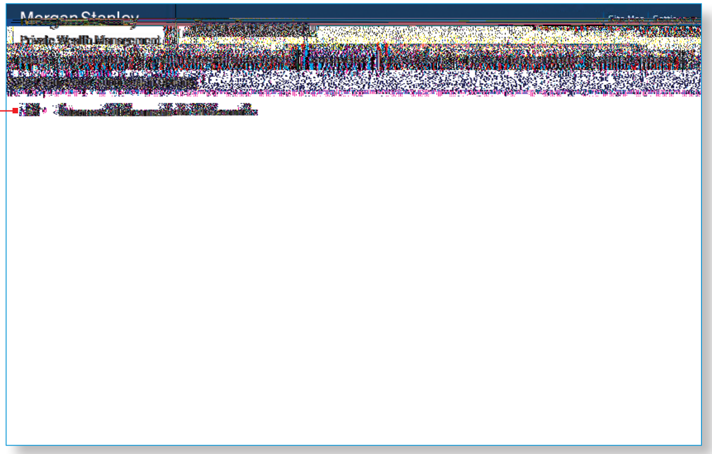
The PWM Statements and Records page provides a 5-year history of 1099 tax documents and a 12-month history of trade confirmations.



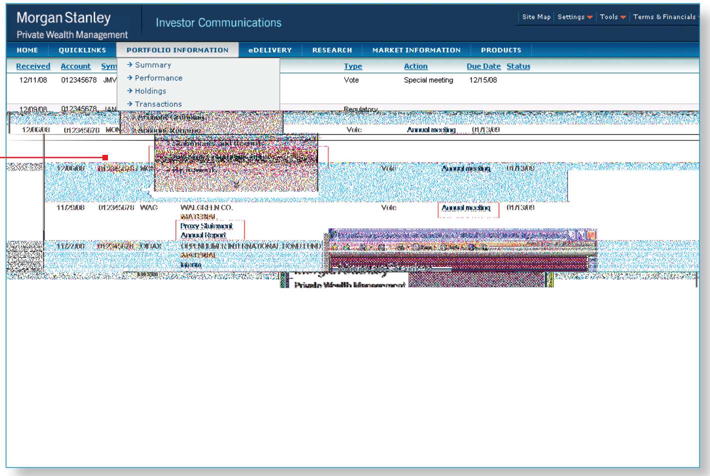
Edelivery Services

Under edelivery, you can suppress your monthly statements and trade confirms, as well as view and suppress investor communications, such as annual reports and proxies.

Receive monthly statements and trade confirms exclusively online.



The Investor Communications Service allows you to view your shareholder communications and vote your shares directly online.



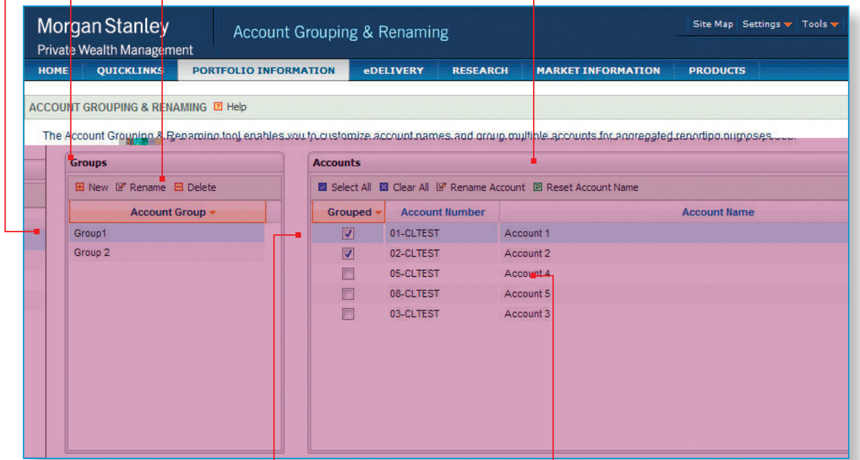
Group and Rename Your Accounts

To assist in the recognition, evaluation and allocation of your portfolio, the account grouping and renaming service makes it easy to consolidate your accounts into logical groupings of your choice.

Name the account grouping.

To create or delete an account grouping, click here.

To go back to the original account name, click Reset.



Select the account(s) you want to group.

Select an account, and type in the new name.

Further Information

HARDWARE/SOFTWARE REQUIREMENTS

To use the Morgan Stanley Private Wealth Management Online platform you must have an authorized user ID and password. Minimum recommended display resolution is 1024 x 768. Your PC must be equipped with a Web browser. For optimal performance we recommend Microsoft® Internet Explorer. Other browser add-ons recommended are Adobe® Acrobat® Reader, Adobe® Flash Player, RealNetworks® RealPlayer, and Java Runtime Environment.

CONNECTING TO MORGAN STANLEY

1. On the location line of your browser, enter the URL: https://secure.ms.com. You can also link to the client platform from the Morgan Stanley home page (www.morganstanley.com).
2. Enter your user name and password. If your services require the use of a SecurID® card, be sure to have this ready as well. Logging on will take you to your personal home page.

WORLDWIDE SUPPORT

For technical assistance – password resets or connection problems – call our technical support number:

U.S./Canada	+1 800-871-1646	Singapore	+65 6834-6155
Hong Kong	+852 3963-2177	Sydney	+61 29 770-9288
Latin America	+(801) 617-9148 (U.S.)	Tokyo	+81 3 6422- 8240
London	+44 207 425-2819		

For content-related issues, call your account representative.

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