Morgan Stanley Wealth Management

Replay Info

Dial-In: 855-859-2056
Conference ID: 6376016
Available until November 11, 2020

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THE BEARING GROUP AT MORGAN STANLEY

Replay: 4th Quarter Wealth Management Outlook

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On Thursday, October 29th, **The Bearing Group at Morgan Stanley** hosted a call to discuss our *4th Quarter Wealth Management Outlook Conference Call*. The series is designed to increase listeners' financial awareness and prepare them to make informed financial decisions.

Our clients have been asking:

- How does the market rebound make sense in the face of the COVID-19 Pandemic?
- What opportunities do low interest rates provide?
- How do the elections change long term investment strategies?

For more information on The Bearing Group, please visit our website.

Brian F. Hickey, CFP®

Senior Vice President, Family Wealth Director, Financial Advisor

As a Family Wealth Director, Brian successfully completed a rigorous accreditation program focused on skills required for comprehensive wealth management across a range of disciplines important to high net worth families and family offices. Brian is responsible for directing clients with generational wealth, life and estate planning, and business transitions.

Matthew J. Filosa, CFA®

Senior Vice President, Senior Investment Management Consultant, Financial Advisor

As a Chartered Financial Analyst (CFA®), Matt is responsible for strategic policy, portfolio optimization, and investment manager selection and monitoring for clients.

Michael D. Ciesemier, CRPS®, CIMA®

Senior Vice President, Alternative Investments Director, Financial Advisor As a Chartered Retirement Planning Specialist (CRPS®), Mike is designated as a Corporate Retirement Director for the firm. Mike is responsible for plan design, fiduciary guidance, and ongoing plan monitoring for our retirement plan clients.

Jason M. Schultz, CRPS®

Financial Planning Specialist, Financial Advisor

Jason works with our retirement plan clients to establish and maintain retirement plans that are designed to meet their unique business goals. Working with you, Jason helps you adhere to best practices in retirement plan design, investment management, employee success, and ongoing plan management for all your financial and retirement plan needs.

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