Morgan Stanley

PRIVATE WEALTH MANAGEMENT

The BlueStone Wealth Management Group at Morgan Stanley

Family Office Services

Dennis Cutrone
Managing Director
Private Wealth Advisor
Family Wealth Director
International Client Advisor

Dennis Cutrone is a Family Wealth Director and has been a Financial Advisor with Morgan Stanley since 1998. Morgan Stanley Family Wealth Directors have experience in a range of disciplines including estate planning strategies, traditional and alternative investments, control and restricted securities, access to lending services, hedging and monetization, and business succession planning.

Dennis is a founding partner of the 14-person BlueStone Wealth Management Group at Morgan Stanley in New York City overseeing $1.8 billion in assets as of January 1, 2018. He manages the Family Office practice for the group working with a small number of ultra-high net worth families and institutions.

Dennis has an MBA from the NYU Stern School of Business as well as a Finance Degree from Pace University Pleasantville, NY.

Don Healy
Senior Vice President
Private Wealth Advisor
Financial Advisor

Don Healy is a Senior Vice President and a Financial Advisor with Morgan Stanley. He offers wealth management and capital market solutions to our Family Office practice — an area within the BlueStone group at Morgan Stanley catering to the needs of ultra- high net worth families and institutions. Don brings extensive trading and capital markets experience to The BlueStone Group. Don began his career in Morgan Stanley's Institutional Equity Division in 1989, leaving as a Managing Director in 2005. During that time, he traded equities, derivatives, and convertible bonds in both New York and London. From 2005–2015, Don served as a Managing Director at Deutsche Bank as a risk manager, led a proprietary trading team, and also created a middle market coverage team servicing over 300 institutional relationships.

Don graduated from Delbarton School in Morristown, NJ as well as the Wharton School, University of Pennsylvania.

Gengsheng Lu
Private Wealth Advisor
International Client Advisor

Gengsheng Lu assists clients with multi-generational, tax efficient, and risk managed wealth planning strategies. As a core focus, she advises Chinese clients for our Family Office Services practice — an area within the BlueStone group at Morgan Stanley catering to the needs of ultra- high net worth families and institutions. Gengsheng assists with the nuanced financial planning needs of cross-border families — orchestrating advise across all providers including legal and taxation.

Gengsheng graduated from East China Normal University. She also received a Master of Arts degree in Anthropology and a Master of Science degree in Finance.

Tania Espinal
Client Service Associate

Tania Espinal joined Morgan Stanley as a Client Service Associate in 2015 and assists both Financial Advisors and Clients with administrative and operational support. Tania is fluent in Spanish and helps cover international clients.

Prior to joining the firm, she worked for several retail banks accumulating more than 10 years + financial services industry experience. Tania graduated from Baruch College in 2013 with a Bachelor of Science in Operations Management and a minor in Spanish.

Kristina Rodriguez
Assistant Vice President
Portfolio Management Associate

Kristina Rodriguez assists Financial Advisors and Clients with administrative and operational Support and has been an instrumental participant in The BlueStone Group since 2006. Kristina's role also includes the administration and trading of our discretionary Portfolio Management Accounts.

Kristina attained a BS from Long Island University/C.W. Post.

Will Rosato
Wealth Advisor Associate

Will Rosato is a Wealth Advisor Associate with The Bluestone Group at Morgan Stanley. Will focuses on the nuances of wealth planning and the innovative digital tools and resources available to serve clients. He helps high-net worth clients uncover their long-term objectives and take the steps necessary to reach their goals by collaborating with Financial Advisors on the team as well as utilizing Morgan Stanley's state-of-the-art tools.

Will graduated from the University of Pennsylvania. He holds a Bachelor of Arts in Economics and is a member of the Mortar Board Honor Society. Will also holds his Series 7 and 66 licenses.

Briana Zhang, CFA
Wealth Management Analyst

Briana Zhang is a member of the Family Office practice within the BlueStone Wealth Management Group at Morgan Stanley. Briana provides clients with customized reporting and assists with risk measurement and portfolio construction. By way of her background, she has a particular focus on alternative investment and fixed income management.

Briana began her career at UBS Wealth Management where she worked in fixed income sales and research. She later joined Goldman Sachs Asset Management in its Alternative Investments & Manager Selection group conducting due diligence on fixed income managers. Her latest role was at UBS O'Connor where she oversaw all aspects of client service for the firm's first private credit fund.

Briana graduated from the University of North Carolina at Chapel Hill. She is a Chartered Financial Analyst (CFA) charterholder.

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