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Alternative investments often are speculative and include a high degree of risk. Investors could lose all or a substantial amount of their investment. Alternative investments are suitable only for eligible, long-term investors who are willing to forgo liquidity and put capital at risk for an indefinite period of time. They may be highly illiquid and can engage in leverage and other speculative practices that may increase the volatility and risk of loss. Alternative Investments typically have higher fees than traditional investments. Investors should carefully review and consider potential risks before investing.

Past performance is no guarantee of future results. Actual results may vary. Diversification does not assure a profit or protect against loss in a declining market.

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**Actual results may vary and past performance is no guarantee of future results.**  
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## OUR TEAM

The Resolute Group at Morgan Stanley has brought together a team of experienced professionals to help ensure our clients receive efficient, professional and friendly financial planning advice and servicing. We provide comprehensive financial planning in the context of a long-term working relationship with you. Through our experience we have learned it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship – one where we can help you achieve your financial and lifestyle goals.

## OUR AFFILIATION WITH MORGAN STANLEY

Our affiliation with Morgan Stanley ensures we can offer our clients financial planning advice and solutions second to none.

With the global resources and scale of Morgan Stanley our financial planning practice is able to deliver exceptional client service and at the same time allow us to have access to the broad range of resources required to plan, implement and monitor our comprehensive financial planning approach.

Managing over \$2 trillion in client assets , and cybersecurity second to none, Morgan Stanley offers a robust platform of investment offerings: traditional, alternative, insurance, and advisory. So whether our clients are faced with concerns about business succession, charitable giving, buying a home, saving for college, or managing stock concentration risk; Morgan Stanley has the resources we need to address the issue.



## OUR PROMISE TO YOU

You can expect that we will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the financial planning solutions we implement on your behalf. Because your financial situation is often complex, we work directly with other professionals to design and implement the strategies that will help you to achieve your goals.



### 01.

Strive to acquire and maintain a thorough understanding of your financial goals.

### 02.

Update your current financial information on a regular basis.

### 03.

Carefully assess and monitor your investment risk & time-frame, communicating often.

### 04.

Explain the implications of all recommended financial planning strategies.



We've learned through experience that effective communication and mutual respect are essential to a long-term working relationship.