

NORTHWEST CAPITAL GROUP AT MORGAN STANLEY

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Morgan Stanley Smith Barney LLC
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NORTHWEST CAPITAL GROUP AT MORGAN STANLEY

Northwest Capital Group at Morgan Stanley serves our affluent clients through the integration of wealth planning, investment management and lending solutions so that we may help to achieve their goals.

Northwest Capital Group at Morgan Stanley is a comprehensive wealth management practice. Our consultative approach seeks to understand your vision, preferences and unique circumstances before we formulate a wealth strategy that helps to achieve your goals and objectives. We provide comprehensive personal investment and advisory strategies for successful individuals, families and foundations.

Through thoughtful dialogue and collaboration, we help clients develop a customized wealth management plan and can provide guidance on important financial decisions. Our service encompasses all aspects of a client's financial life, including in-depth financial planning, customized portfolio construction and management, risk mitigation and wealth transfer strategies. Our investment strategies are tailored to our client's goals, time frame and risk tolerance. Conversations with our clients include listening to their hopes and concerns, while providing feedback on progress made toward achieving their goals. We can also draw on the experience of additional firm specialists in areas such as lending, trusts and insurance to maximize our effectiveness.

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