

Our Viewpoint

Our Mission

By combining the experience and skills of the Jeffrey Group at Morgan Stanley Smith Barney, we deliver tailored investment strategies designed to help you manage and preserve your wealth.

We seek to build our client relationships with careful consideration of your short and long-term objectives. We believe that to grow that relationship, we need to consistently measure, review and evaluate those objectives.

The Jeffrey Group will strive to transcend your expectations and work for you so that you can spend your time on the things that matter most to you.

Our Vision

The Jeffrey Group at Morgan Stanley Smith Barney places high value on relationships and strives to provide you with the best possible service.

Our team hopes to make an impact on your life by earning your trust. With your trust we can work to help you accomplish your financial goals. We will help you come up with possible solutions to any problems along the way.