

| |
|--|
| News Indices |
| Dow 10318.16 -14.28 4:31pm |
| Nasdaq 2146.04 -10.78 5:30pm |
| S&P 500 1091.38 -3.52 5:01pm |

Enter Symbol

Symbol Name

Separate multiple symbols with a space

- > Group Homepage
- > Meet Our Group
- > Our Story
- > Our Viewpoint
- > Special Reports
- > Financial Planning
- > Brochures
- > Educational Articles
- > Women & Co.
- > Key Links
- > Our Branch
- > Map & Directions
- > Guest Book
- > Enroll in smithbarney.com

- > E-mail Us
- > Request Information
- > Account Forms
- > Request Appointment
- > E-mail This Site To A Friend



The Forster Group at Morgan Stanley Smith Barney

Consulting Group

1014 Santa Barbara Street
Santa Barbara, CA 93101

tel: 805-564-7904
toll free: 800-874-0282
fax: 805-564-7949

[\[Click to enlarge\]](#)

[>> Email Us](#)

Welcome

Meet Our Group

Services

Welcome



We seek to understand our clients broadly and deeply enough to find the opportunities that add value not only to their financial objectives, but also to their life aspirations. We determine what's really important and develop actionable, flexible strategies to help them meet their financial needs. We also design socially responsible investing portfolios for those who want to truly align their values with their investments, while also helping to deliver the financial returns that they desire.

Bulletin Board

- May the Joy and Wonder of this holiday season bring you peace, health and happiness throughout the coming year.
- Join us December 1, 2009 at 4:00PM Eastern for the continuation in the series of conference calls on Taxes in America: Preparing for the New Reality, sponsored by Eaton Vance Investment Managers with Andy Friedman, a Washington expert and one of the nation's most sought-after speakers on political and legislative developments and their likely effect on the government's tax, fiscal and retirement policies. This month's topic: Gift and Estate Planning - Will the estate tax, in fact, disappear next year or will Congress act? What will the effect of any legislative action be on various gift and estate planning strategies, and how you should be preparing yourself? For more details, see brochures.

Participant Dial in number: (866) 502-2159

- Ask us about developing, with you, a free Comprehensive Financial Plan based on your financial goals and objectives, and then implementing a disciplined investment strategy designed to help you achieve those goals.

This information, products and services described here are intended only for individuals residing in states where this Financial Advisor is properly registered as described in this site.

*Includes years at Smith Barney, affiliates and predecessor firms.

Morgan Stanley Smith Barney LLC and its affiliates do not provide tax or legal advice. To the extent that this material or any attachment concerns tax matters, it is not intended to be used and cannot be used by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Any such taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame log®) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Log in to your portfolio >>

FEATURED REPORTS

2009 Year-End Tax Planning Guide (pdf)

Strategies for Institutional Investors (pdf)

Roth IRA Conversion Opportunity - A New Retirement Plan Strategy Beginning in 2010 (pdf)

Kick Your Assets
Into Shape...



Investment Management Consultants Association, Inc. owns the marks CIMA®, Certified Investment Management Analyst (with graph element)®, and Certified Investment Management Analyst.

[About Us](#) [Institutional Services](#) [Privacy](#) [Security](#) [Terms and conditions](#)

Investment products and services are offered through Morgan Stanley Smith Barney LLC, [member SIPC](#). Morgan Stanley Smith Barney LLC is a registered broker/dealer and investment advisor, formed by the combination of the Global Wealth Management Group of Morgan Stanley & Co. Incorporated and the Smith Barney division of Citigroup Global Markets Inc.

In general, references to Smith Barney or the Smith Barney division of Citigroup Global Markets Inc. should be read on this site as the Smith Barney channel of Morgan Stanley Smith Barney LLC. Some products or services may continue to be available through Citi or Citigroup Global Markets Inc. Read more on the [Statement of Morgan Stanley Smith Barney LLC and Citigroup Global Markets Inc. Responsibilities](#) that describes their respective roles and functions. Clients may contact their Financial Advisor with questions about these changes.

The information and services provided on the website are intended for persons in the U.S. only.

© 2009 Morgan Stanley Smith Barney LLC. [Member SIPC](#). Accounts carried by Citigroup Global Markets Inc. [Member SIPC](#). All rights reserved.