

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

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Welcome



You've worked hard to accumulate your wealth; now you need those assets invested responsibly in a complex environment. The Consulting Group of Morgan Stanley Smith Barney, has developed a disciplined process that helps you design customized investment strategies that help you meet your personal needs. Working together, we can design a suitable asset allocation strategy, select appropriate investment managers and monitor results over time. A cornerstone of Consulting Group's process is our in-depth research and evaluation of professional portfolio managers. Only those managers that pass our stringent research process are approved for use by our clients. In addition, we regularly evaluate those managers to help ensure they continue to meet our quality standards. If you would like more information about how Consulting Group's investment process and our manager evaluation services can help you meet your needs, please contact me.

Bulletin Board

- Employing asset allocation within your investment portfolio is key to producing desired long-term returns and reducing undesired volatility.
- Are you ready for retirement? We think of retirement as part of the bigger picture-your life. Whatever you have in mind, the ideal is to have the flexibility to make choices based on what you want to do, not what you have to do. Call to develop a plan for achieving the retirement you envision.
- I am very appreciative when existing clients introduce friends, family, and business associates for an exploratory meeting. I will do my utmost to meet your highest expectations. Please email a link to my website to anyone in your life that may be facing a life changing event, such as retirement or an estate issue.

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