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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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The Sun Group at Morgan Stanley Smith Barney

Consulting Group

1901 Main Street
Penthouse
Irvine, CA 92614

tel: 949-955-7889
toll free: 800-533-3402 ext. 889
fax: 949-833-3542

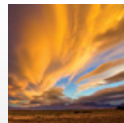
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Welcome

Meet Our Group

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

- See In The Press on the left-hand side for our latest announcements.
- We are very appreciative when existing clients refer friends, family, and business associates for an exploratory meeting. We will do our utmost to meet your highest expectations.
- Contemplating retirement? Rolling over a 401(k)? Have IRA Rollover questions? Let us help. Please contact us.

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