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<b>Dow</b>	10318.16	<b>-14.28</b>	4:31pm
<b>Nasdaq</b>	2146.04	<b>-10.78</b>	5:30pm
<b>S&amp;P 500</b>	1091.38	<b>-3.52</b>	5:01pm

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## The Schwab Group at Morgan Stanley Smith Barney

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Welcome Meet Our Group

### Welcome



Our team is dedicated to providing comprehensive strategies to our clients facing the numerous and complex challenges created by substantial wealth. Their concerns include:

- \* Maintaining their lifestyle in retirement.
- \* Positioning their assets for the next generation while minimizing estate taxes.
- \* Minimizing income and capital gains taxes.
- \* Supporting charitable causes.
- \* Protecting their assets from creditors and litigation.
- \* Creating a legacy that will keep their family productive.
- \* Forming a succession or exit plan for their business.
- \* Diversifying or hedging a concentrated investment
- \* Raising capital for a new venture or some other purpose.

If these or any other topics are of interest to you, we'd welcome the opportunity to discuss them with you.

### Bulletin Board

- Please see Our Viewpoint on the left for a copy of our latest Newsletter.

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[2009 Year-End Tax Planning Guide \(pdf\)](#)

[On the Markets \(pdf\)](#)

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