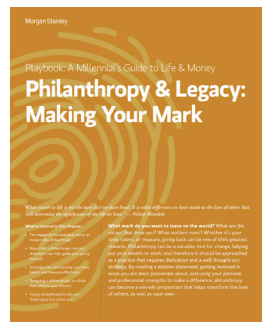
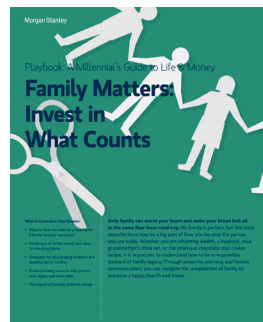
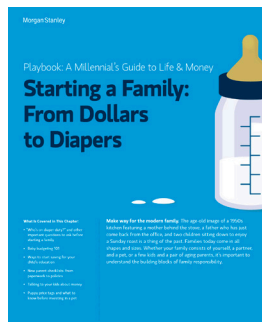
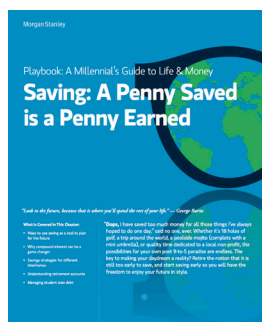


An Overview of the Playbook: A Millennial's Guide to Life and Money

How much of your savings should you be investing? Should you share your finances with a significant other? How do you know when you're ready to buy a home, or start a business? If you're wrestling with some of these questions, the Playbook: A Millennial's Guide to Life & Money may have the answers you're looking for.

The "Playbook: A Millennial's Guide to Life & Money" is a content series focused on providing highly actionable insights and advice that covers 10 major life milestones. Filled with articles, checklists, interviews, and helpful tips, the Playbook aims to empower you with the knowledge and tools needed to help achieve your goals: whether it's buying a home, starting a family, pursuing a passion, or giving back.



Sharing insights from our own Morgan Stanley thought leaders and knowledgeable professionals, the Playbook can help you avoid common money mistakes with “Winning Plays” and provides a framework for tough decisions such as:

- Is Grad School a worthwhile investment for you
- Buying vs. Renting a Home
- How to think about donating your time, talent, and treasure to causes you care about

The Playbook can also be used to facilitate important family conversations about the purpose of wealth with topics including:

- 12 questions to ask your partner before [financially] committing
- What to consider before investing in, or accepting investment from, friends and family
- How to inherit a family business wisely

Each chapter features “Questions to Ask Your Financial Advisor” to help you prepare for certain challenges and decisions with the help of an experienced professional. Playbook-inspired videos and articles are also available to help you get smart about specific topics.

Money is often considered a taboo topic, but it shouldn't be. When managed intelligently, wealth can be a powerful tool for impact. We created the Playbook as a resource to help you navigate the road ahead and explore new horizons with confidence.



To learn more about the Playbook and other resources available to help you navigate various life milestones, contact me.