Graystone Consulting
from Morgan Stanley

A View from Washington: An Interview with Morgan Stanley's Head of U.S. Policy, Monica Guerra

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On Tuesday October 21, George Cook with Graystone Chicago NW discusses investment opportunities and current markets for the 4th quarter of 2025 with featured guest, Head of U.S. Policy for Morgan Stanley, Monica Guerra.

Investors want to know:

- What role have tariffs played in the economy and markets so far?
- Will the Supreme court revoke tariffs and what might happen next?
- What is the current administration's bet on AI and U.S. productivity?
- What benefits (and/or concerns) might result from AI adoption?
- Who is benefitting most right now in the current environment?
- What underinvested areas of the market look interesting

DETAILS
Date: Tuesday, October 21st
Time: 11:00 a.m. (ET) / 10:00 a.m. (CT)

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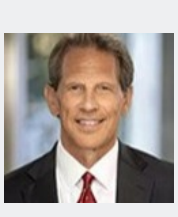
Register

Speakers:

Featured Guest: Monica Guerra
Head of U.S. Policy for Morgan Stanley

Monica Guerra is an Executive Director and Head of U.S. Policy for Morgan Stanley Wealth Management. In this role she drives strategic public policy and market research, providing multi-asset investment guidance to financial advisors and clients. Prior to this role, she was a member of the Morgan Stanley Wealth Management Municipal Research team and a credit analyst in the Public Finance Group at Fitch Ratings. With a decade of public service experience, she has held roles shaping economic and fiscal policy, including serving as a Director of Capital Budget and Economic Development for the City of New York, a member of the New York State Regional Economic Development Councils, and as a Legislative Aide in the U.S. House of Representatives, where she developed financial regulatory policy and lead federal appropriations efforts.

Monica is a contributor on Bloomberg News and her views have been cited by the Financial Times, Barron's, and Politico, among others. She holds an M.P.A. in Public Finance from NYU, is a Council on Foreign Relations Corporate Leader, and was a 2023 Fellow of the Economics Club of New York.



George T. Cook
Managing Director Wealth Management, Institutional Consulting Director

George T. Cook is a Managing Director for Graystone Consulting, a division of Morgan Stanley. As an Institutional Consulting Director, George is responsible for strategic policy, portfolio optimization and investment manager selection at Graystone Consulting – Chicago NW.

Brad Peterson
Institutional Consultant

Brad Peterson is an Institutional Consultant for Graystone Consulting, a division of Morgan Stanley. He has over 8 years of experience in the financial industry, and his focus includes investment manager research, strategic asset allocation, and investment portfolio development.

Feel free to listen to this call at your convenience. Please do not hesitate to reach out should you have questions or would like additional insight from our team at Graystone.

Reach out to graystonechicagonw@morganstanley.com with any further questions.

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Important Disclosures

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Source: Barrons.com (April 2016-2024) Barron's Top 100 Institutional Consulting Teams ranking awarded in 2016-2024. Each ranking was determined based on an evaluation process conducted by Barron's which concluded in December of the previous year the award was issued having commenced in December of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

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