

Morgan Stanley

PRIVATE WEALTH MANAGEMENT

**Lifestyle Advisory
by Morgan Stanley**

Curated Access for Elevated Living

EXPECT EXTRAORDINARY ACCESS

Lifestyle Advisory by Morgan Stanley is our premier selection of lifestyle specialists. We curate exclusive introductions and provide education to unlock more possibilities across all areas of the lives of clients and their families.

In collaboration with your Morgan Stanley Private Wealth Advisor, Lifestyle Advisory is an extension of the highly individualized service you expect from Morgan Stanley. We are here to support your long-term goals and help manage the complexities of day-to-day life.

Select offerings from esteemed specialists, chosen for their seamless delivery of bespoke and personalized services.

LEISURE AND EXPERIENCES

Luxury Travel

Tickets and Events

Aircraft Advisory

Yacht Advisory

HOME AND SECURITY

Real Estate Advisory

Personal and Home Security

Home Staffing

Bookkeeping

**PERSONAL PURSUITS
AND ENRICHMENT**

Art Advisory

Hobbies and Passions

Genealogy

Higher Education Consulting

Executive Coaching and Placement

HEALTH AND WELLNESS

Private Health Advisory and Advocacy

Longevity Planning

Specialty Care

To find out more, or to access your complimentary Lifestyle Advisory Concierge, please contact your Private Wealth Advisor or email lifestyleconcierge@morganstanley.com

UNRIVALED PERSONALIZATION

Our curated group of specialists provides customized advice tailored to your distinctive lifestyle. From simple consultations to complex strategic coordination, they are here to help streamline important life decisions and elevate your experiences.

We have negotiated preferred terms for our clients to enjoy select benefits through their relationship with Morgan Stanley. Since our top priority remains finding the best solution for our clients' unique needs, Morgan Stanley does not receive any revenue from these third-party specialists.



Leisure and Experiences

AIRCRAFT ADVISORY

Advice on the best aviation solutions to fit you and your family's travel needs, including charters, jet cards, fractional ownership and private jets. Enjoy your time in the air with our support to handle all due diligence, maintenance records, flight hours, insurance and other logistics.

LUXURY TRAVEL

Enjoy the ease and delight of traveling with bespoke itineraries and accommodation in private homes and villas, tailored to your personal taste and schedule. Our specialists can customize travel experiences for you and your family, from remote excursions and extraordinary outdoor adventures to classic safari, sailing and European Grand Tour experiences.

TICKETS AND EVENTS

Access to sold-out events, private tours, ultra-VIP packages and celebrity appearances — our specialists can identify exceptional occasions that match your taste and interests, then coordinate every detail for a seamless, uniquely memorable experience.

YACHT ADVISORY

Enhance your enjoyment aboard with advice on the right selection for your lifestyle and professional management of buying, leasing, staffing and maintenance requirements.



Health and Wellness

PRIVATE HEALTH ADVISORY AND ADVOCACY

Access on-call, individualized support from our team of private health advisors, who are available to facilitate expedited access to care and provide guidance to help you better understand and navigate complex medical needs.

LONGEVITY PLANNING

Comprehensive wellness guidance for you and your family, including preventative health care, tailored nutrition and fitness plans, private coaching and access to some of the world's top facilities for wellness and rejuvenation.

SPECIALITY CARE

Tailored care that directly addresses unique, emerging or more complex medical needs, to support overall quality of life for you and your loved ones. Our in-house team works in tandem with an extended network of practitioners across areas of specialization, including oncology, mental health support, elder care and concierge medical services.



Home and Security

REAL ESTATE ADVISORY

Simplify changes to your real estate portfolio with brokerage house assistance for purchase, relocation, renovation, leasing and sales support.

HOME STAFFING

Comprehensive and confidential recruitment services for household staff for your residences. Streamline home management, improve retention and reduce costs and liabilities associated with domestic hiring and employment.

PERSONAL AND HOME SECURITY

Reduce the complex security risks inherent in tangible asset and property management, and protect yourself and your family with comprehensive personal security services, including cybersecurity, disaster preparedness, staff screenings and extensive safety audits.

BOOKKEEPING

Simplify the complexities of personal finances with bill pay, tax filing and expense management. Custom cash flow reports and tailored bookkeeping, working in tandem with your CPA and Private Wealth Advisor to streamline your financial life.

Endless Possibilities Await

Lifestyle Advisory by Morgan Stanley creates connections that unlock extraordinary experiences. To schedule a consultation with your Lifestyle Advisory Concierge, please speak with your Private Wealth Advisor.



Personal Pursuits and Enrichments

ART ADVISORY

Whether you are just beginning to collect or are already an experienced owner, our art specialists are available to advise on any needs for your collection, from sourcing a piece for your specific taste to appraising a collection and selling it at auction.

HOBBIES AND PASSIONS

Explore your interests more deeply and enhance your enjoyment of them. Perhaps you are embarking on a new chapter in your life or are continuing a lifelong pursuit; whatever your passion, our specialists are available to curate unique opportunities for you to explore what excites you.

EXECUTIVE COACHING AND PLACEMENT

Hone your advantage and identify your next opportunities with the in-depth, objective guidance of high-level executive coaching and placement professionals. Our specialists support your top-tier performance through individual attention that enables you to thoroughly review your successes, envision your next ambitions and define the path forward toward achieving them.

HIGHER EDUCATION CONSULTING

Expertly navigate the application process for undergraduate and graduate programs, as well as private schools in select cities, with the support of our admissions specialists. With extensive experience at some of the country's top educational institutions, they are able to advise on every aspect of admissions, from school selection and holistic application guidance to interview and test preparation.

GENEALOGY

Uncover your family story with direct access to experienced researchers and genealogists, then bring it to life with the help of celebrated filmmakers, authors and historians. Archive management, family artifact restitution and tailored services for adoptees and birth parents are also available to aid your journey to honor and celebrate your family's history.

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