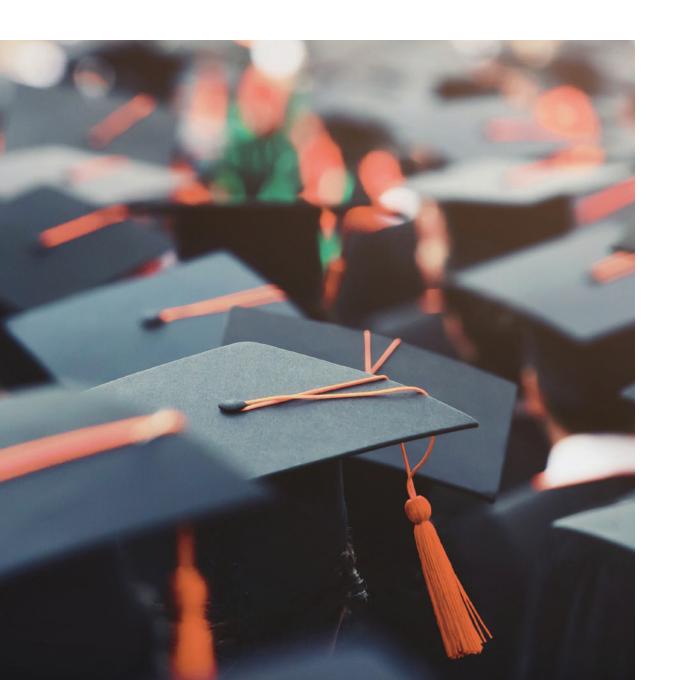
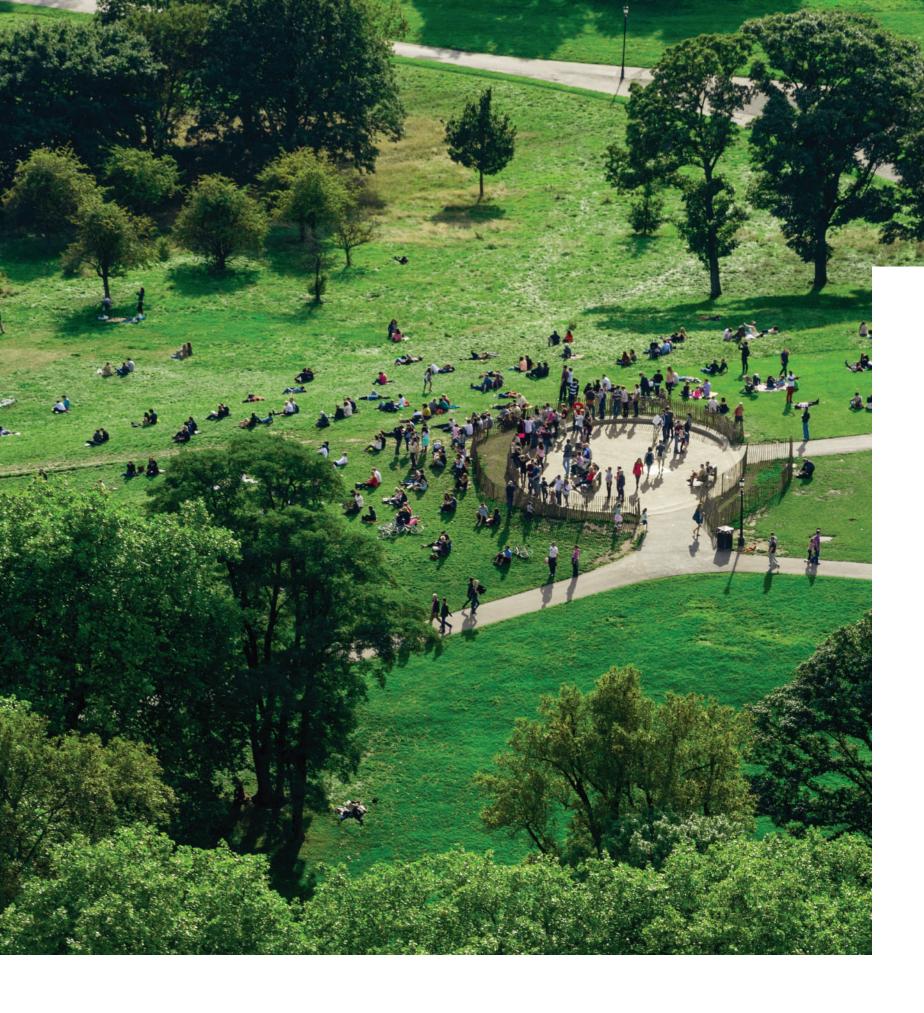


# Distinctive Solutions for Educational Institutions





## **Trusted Guidance for Academic Organizations**

Servicing a broad array of academic organizations, we provide trusted advice and customized solutions by combining the fresh thinking of a consulting boutique with the deep knowledge and experience of Morgan Stanley.

We ensure the right consultants are in the seat from the first day you meet. You'll get a deeply experienced team who will take the time to truly understand your institution, develop innovative strategies to address your challenges, and build a long-term relationship based on trust.

#### **Our Education Clients**

Graystone works with a broad range of academic institutions representing \$10.9 billion in total assets under management.<sup>1</sup>

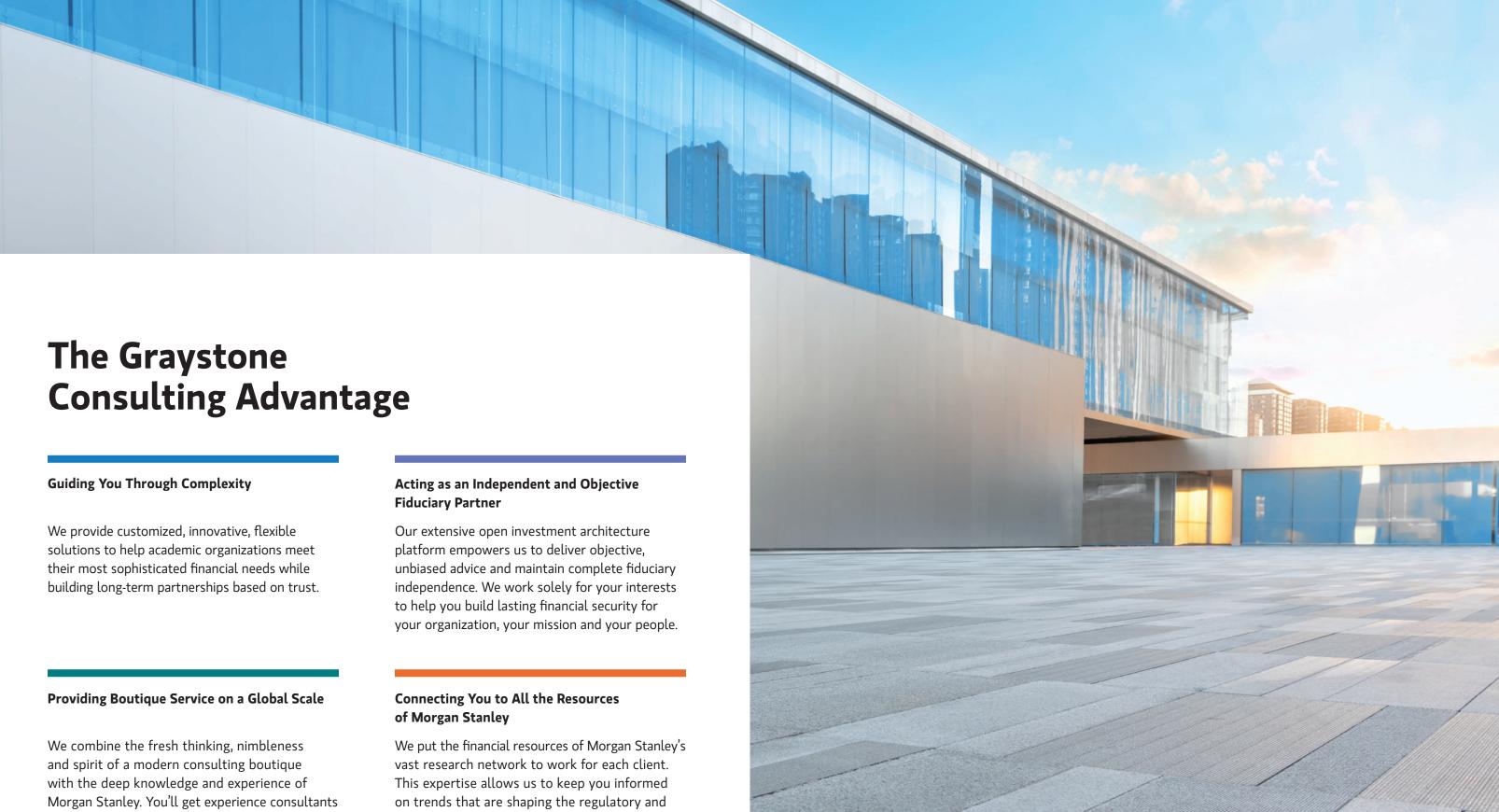








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who take the time to truly understand you and your organization and develop innovative strategies to address your challenges.

macroeconomic environments while providing you access to a world-class set of complementary financial services.

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# Access to Morgan Stanley's Comprehensive Corporate Solutions

## **Defined Contribution Consulting**

Guidance for sponsors of 401(k) and other defined contribution plans in designing and overseeing their organizations' plans and helping employees prepare for retirement.

#### **Executive Services**

Specialized guidance and tailored solutions to help meet the financial needs of executives.<sup>2</sup>

## **Defined Benefit Consulting**

Comprehensive consulting to help protect participants and support organizations' financial health by helping to improve funding ratios, minimizing funded status risk or de-risking portfolios.

### Corporate Cash Management

Corporate liquidity solutions to support corporate growth and stability.

### Nonqualified Deferred Compensation Plans

Customized, integrated plans designed to attract and retain executives and other key employees.

## Investment Banking & Capital Markets

Access to expert corporate finance advice and solutions.

#### The Graystone approach is backed by the strength of Morgan Stanley

We combine local expertise and global resources to help our clients make informed, confident investment decisions.



**\$614.2** BILLION

in total institutional assets under management<sup>3</sup>



YEARS
of experience advising institutional clients



280+
CONSULTANTS
serving institutional
clients<sup>4</sup>

#### Deep research drives our investment approach

The scale and depth of our in-house research is the foundation of our open-architecture investment platform.



~65

analysts dedicated manager analysis<sup>5</sup>



**4,800+** strategies monitore

\*400 investment manager relationships 5

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#### Let's Talk

We look forward to starting the conversation on how we can help.

graystoneconsulting@morganstanley.com graystoneconsulting.com

- <sup>1</sup> As of December 31, 2023.
- <sup>2</sup> Certain products and services require individual Morgan Stanley Wealth Management accounts. Tax laws are complex and subject to change. Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Individuals are urged to consult their personal tax or legal advisors to understand the tax and legal consequences of any actions, including any implementation of any strategies or investments described herein.
- <sup>3</sup> As of December 31, 2023. Mandates include all Assets Under Management and Assets Under Advisement.
- 4 As of December 31, 2023.
- <sup>5</sup> As of March 2024. Source Global Investment Manager Analysis (GIMA).
- <sup>6</sup> Global Investment Manager Analysis (GIMA), March 2024 Investments and services offered through Morgan Stanley Smith Barney LLC When Morgan Stanley Smith Barney LLC, its affiliates and Morgan Stanley Financial Advisors and Private Wealth Advisors (collectively, "Morgan Stanley") provide "investment advice" regarding a retirement or welfare benefit plan account, an individual retirement account or a Coverdell education savings account ("Retirement Account"), Morgan Stanley is a "fiduciary" as those terms are

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