Morgan Stanley

FOR IMMEDIATE RELEASE

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Morgan Stanley Wealth Management Announces The PacWest Group at Morgan Stanley

[PORTLAND, OR, November 20, 2017] – Stephen Jackson, Financial Advisor, Senior Institutional Consultant and Certified Investment Management Analyst® (CIMA®) with Morgan Stanley in Portland, OR, has merged his practice with the existing team of Josh Bratt, Vice President, CIMA® and Wealth Advisor, and Ken Anderson, Financial Advisor, Portfolio Manager and Certified Financial Planner™ practitioner. With this merger, they—along with their Client Service Associates, Michele Stauss, Johnna Chesley and Brittany Rakoz—have formed The PacWest Group at Morgan Stanley.

The PacWest Group at Morgan Stanley – From Left to Right: (back row), Ken, Johnna, Josh; (front row) Michele, Steve, Brittany.

Collectively, The PacWest Group brings multiple decades of financial services industry experience to provide their select clientele with comprehensive wealth and investment planning solutions. As seasoned professionals, they combine their knowledge, skills and talents with the global resources and reach of Morgan Stanley to address sophisticated client situations and help tailor strategies designed to meet each client's unique short- and long-term goals. By delivering a truly personalized service, transparency, and attention to detail, they strive to add value in the process.

"The strength of The PacWest Group at Morgan Stanley lies in our common business philosophy and investment ethic, as well as our shared dedication to holistic planning and institutional quality portfolio management. These values remain a constant in our practice," says Stephen Jackson. "With the combination of our experience, depth and support, we are even better prepared to capitalize on rapidly changing market and technology forces on behalf of our clients and their families."

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

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