Morgan Stanley
AT WORK

MERCURY INSURANCE

# Complimentary Financial Consultations with Morgan Stanley

## The Morgan Stanley Financial Wellness team is pleased to provide you with resources, education and guidance to help you manage your financial life.

We are offering Mercury employees the opportunity to have a complimentary 30-minute virtual meeting with a Morgan Stanley Financial Advisor to discuss your situation, ask questions and get started on the path to building financial strategies personalized to your needs.

Please note, these sessions are intended to serve as a broad discussion about your personal finances rather than to provide complex financial advice or financial strategies plans. All discussions are strictly confidential, and your personal information is not shared with your employer.

Please click **here** to schedule a consultation with a Morgan Stanley Financial Advisor.

### Commonly Discussed Topics Include:

- Strategies for equity compensation
- Ways to manage everyday finances
- Advice on how to achieve personal financial goals (e.g., saving for college, planning for retirement, paying down debt, purchasing a home)
- How to build and protect personal wealth (e.g., trust and estate planning)
- Charitable giving
- Socially responsible investing
- Morgan Stanley investing solutions (from self-service to full-service)

### To make your session as productive as possible, you might consider bringing the following:

- Details on your household income and expenses
- List of your financial accounts and approximate balances (e.g., checking, savings, 401(k), IRA, investments, education savings, insurance policies)
- List of your short- and long-term financial goals

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors and Private Wealth Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.