Morgan Stanley

FOR IMMEDIATE RELEASE

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John J. LeRose III Receives Family Wealth Advisor Designation

Milwaukee, October 8th, 2018 – Morgan Stanley announced today that John J. LeRose III, a Senior Portfolio Manager, Financial Planning Specialist, and Financial Advisor in the Firm's Wealth Management office in Milwaukee, has attained Morgan Stanley's Family Wealth Advisor (FWA) designation.

The FWA designation is granted to those Financial Advisors who have successfully completed an accreditation program which trains them to work with families across generations to help define their goals and develop a financial plan. With this specialized knowledge, FWAs are able to provide strategic guidance to families and deliver wealth management strategies that put families – and their collective values and goals – first.

“This achievement is an attestation of John's ongoing commitment to serving the unique needs of our clients and their families. John has received the training to help him understand how family circumstances and dynamics can influence and impact short- and long-term personal and financial goals. His proven ability to work with families to develop a framework for their financial future helps to set him apart from others within the industry,” said Daniel T. Krause, Executive Director and Complex Manager of Wisconsin.

Family Wealth Advisors are well-positioned to help families set financial priorities, protect their family enterprise, practice impactful philanthropy and put estate plans in place. They are also skilled in connecting with the next generation and engaging them in the discussions.

Mr. LeRose has been a member of the financial services industry for 8 years and holds an Economics degree from the University of Wisconsin - Madison.

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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