

Morgan Stanley

FORM ADV BROCHURE SUPPLEMENT

September 10th, 2025

SUZANNE ELLEN LINDQUIST (CRD #: 2277322)

Group:	Outsourced Chief Investment Office (OCIO) Investment Committee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

This brochure supplement provides information about **SUZANNE ELLEN LINDQUIST** that supplements the applicable Morgan Stanley Smith Barney LLC ("Morgan Stanley") ADV brochure. You should have received a copy of that brochure. Please contact your Financial Advisor or Private Wealth Advisor if you did not receive Morgan Stanley's brochure or if you have any questions about the contents of this supplement.

Additional information about SUZANNE ELLEN LINDQUIST is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

This section states the Investment Professional's formal education after high school, business background for the last five years and certain professional designations.

Name:	SUZANNE ELLEN LINDQUIST (b. 1963)
Education:	UNIVERSITY OF MARYLAND (BACHELOR OF SCIENCE)
Business Background (Past 5 Years):	2014 – Present, Managing Director, Head of OCIO Endowments and Foundations, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	N/A

Disciplinary Information

This section describes certain legal or disciplinary events that may be material to your evaluation of the Investment Professional, generally within the last ten years (e.g., certain findings by regulators in administrative proceedings, customer disputes, and criminal charges). Investment Professionals are required to comply with all applicable rules and regulations. They are also subject to internal policies and procedures under which they commit to working with integrity and high ethical standards at Morgan Stanley. However, Investment Professionals may have been subject to legal or disciplinary events and certain types of these events are disclosed in this section.

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No material legal or disciplinary events to disclose.

Other Business Activities

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Investment-Related Businesses

Morgan Stanley is a registered broker-dealer. The Investment Professional is a registered representative of Morgan Stanley (in its capacity as a broker-dealer). Morgan Stanley is also a registered investment adviser. Morgan Stanley is qualified to offer you not only investment advisory products and services through advisory accounts, but also various other investment products and services through brokerage accounts.

Compensation for Investment Professionals

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No additional business activities to disclose.

Additional Compensation

No additional compensation to disclose.

Supervision

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Supervisor:	Sona Menon, Head of OCIO Client Solutions
Supervisor Tel:	+1 (212) 762-0264

Morgan Stanley

FORM ADV BROCHURE SUPPLEMENT

September 10th, 2025

BRANDON SCOTT DEES (CRD #: 5384215)

Group:	Outsourced Chief Investment Office (OCIO) Investment Committee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(888) 454-3965
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Educational Background and Business Experience

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Name:	BRANDON SCOTT DEES (b. 1984)
Education:	B.S. in Business Administration from the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill
Business Background (Past 5 Years):	2016 – Present, Executive Director, Head of OCIO / MSFO IO Alternative Investment Solutions, MORGAN STANLEY WEALTH MANAGEMENT 2008 – 2016, Vice President, Goldman Sachs
Professional Designations:	N/A

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Supervisor:	Sona Menon, Head of OCIO Client Solutions
Supervisor Tel:	+1 (212) 762-0264

Morgan Stanley

September 10th, 2025

BRIAN JACOB MULLEY (CRD #: 4165876)

Group:	Outsourced Chief Investment Office (OCIO) Investment Committee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about BRIAN JACOB MULLEY is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

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Name:	BRIAN JACOB MULLEY (b. 1977)
Education:	B.S. in Finance from University of Massachusetts Lowell.
Business Background (<i>Past 5 Years</i>):	11/2005 – Present, Managing Director, Head of OCIO UHNW & International, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	N/A

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Additional Compensation

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Supervisor:	Sona Menon, Head of OCIO Client Solutions
Supervisor Tel:	+1 (212) 762-0264

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Morgan Stanley

KEVIN EDWARD KOPCZYNSKI (CRD #: 2050158)

Group:	Outsourced Chief Investment Office (OCIO) Investment Committee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about KEVIN EDWARD KOPCZYNSKI is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

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Name:	KEVIN EDWARD KOPCZYNSKI (b. 1965)
Education:	HAVERFORD COLLEGE (BACHELOR OF ARTS)
Business Background (Past 5 Years):	06/01/2009 – Present, Executive Director, Head of OCIO Taft-Hartley & Government Solutions, MORGAN STANLEY WEALTH MANAGEMENT
Professional Designations:	Chartered Financial Analyst® or CFA® The CFA® designation is conferred by the CFA Institute to individuals who demonstrate knowledge of certain investment principles and meet professional conduct requirements. To receive authorization to use the designation, a candidate must meet the following criteria: (1) hold an undergraduate degree (or equivalent, as assessed by the CFA Institute); (2) have four years of acceptable professional work experience involving the investment decision-making process, supervising persons who practice such activities, or teach such activities; (3) study for and successfully complete three exams that test the academic portion of the CFA® program; and (4) pay an annual membership fee. Exam areas of focus include principles and concepts that apply to investment analysis, valuation, and portfolio management. Candidates seeking a CFA® designation must also become a member of the CFA Institute, agree to the CFA Institute's Code of Ethics and Standards governing a candidate's professional conduct on an annual basis, and apply for membership to a local CFA® member society.

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*380941- Estate; Investment related No; New York, NY; Executor; Sep 2019; During business hours: 0; After business hours: 2

*555217 – Trust; Investment related: Yes; Harrison, New York; 05/2023; During business hours: 0; After business hours: 10

Compensation for Investment Professionals

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Supervisor:	Cameron McCarthy, Head of OCIO Retirement & Government Entities
Supervisor Tel:	+1 (212) 762-2230

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CAMERON A MCCARTHY (CRD #: 6345907)

Morgan Stanley

Group:	Outsourced Chief Investment Office Investment Committee
Address:	2000 Westchester Avenue Purchase, NY 10577-2530
Investment Professional Tel:	(800) 223-2440
Corporate Address:	Morgan Stanley Smith Barney LLC 2000 Westchester Avenue Purchase, NY 10577-2530
Corporate Tel:	(914) 225-1000

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Additional information about CAMERON A MCCARTHY is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

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Name:	CAMERON A MCCARTHY (b. 1994)
Education:	B.S. in Finance from Bentley University
Business Background (Past 5 Years):	10/2021 – Present, Executive Director, Head of OCIO Retirement & Government Solutions, Morgan Stanley Wealth Management 03/2020 – 09/2021 Fixed Income Portfolio Manager, Mercer Investments (Principal/Senior Associate) 08/2019 – 03/2020 Senior Associate, Mercer Investments 04/2018 – 08/2019 Associate, Mercer Investments
Professional Designations:	N/A

Disciplinary Information

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