MorganStanley
SmithBarney

Customized Financial Strategies

The Cohn Weisskopf Group at Morgan Stanley Smith Barney

Time for You

The Cohn Weisskopf Group at Morgan Stanley Smith Barney offers our clients a powerful combination—extensive financial knowledge and an uncommon level of personal attention.

We'll spend as much time as necessary to get to know you and all of your financial needs. This is how we strive to earn our clients' trust every day and build strong relationships that endure through the years. Take a minute to find out how we can do the same for you.

Your Personal C.F.O.

The Cohn Weisskopf Group–led by experienced Financial Advisors Lee Cohn and Philipp Weisskopf–takes a holistic approach to your financial life.

In other words, we're not just executing trades or recommending specific investments. We can serve as your family's chief financial officer.

Big and Small

In this role, we can help you with the big stuff–including managing your investments and your portfolio's asset allocation, optimizing your tax situation and helping you plan your estate.

We can also streamline your everyday financial tasks. Whether it's basic budgeting, assessing your financial situation after a major life event or financing a home purchase, we take a broad view of what a financial advisory team should do.

We want to give you more time for the things that matter most to you–your family, your leisure activities and your business needs.

So Much More

In fact, our services are limited only by the creativity of our clients. For example, if you want us to deliver a detailed financial report to your house, we'll provide it to you. Do you need help setting up an automatic bill payment service to help make sure you never miss a credit card bill? Consider it done.

We even provide technical support to help you set up your computer and printer–giving you round-the-clock access to your financial information.

These aren't the kinds of services many financial advisor teams can or will offer, but we believe that's what a personal CFO is for.

"We guide and reassure our clients every step of the way–especially during times of market volatility. During difficult transitions in their lives, we even help them with financial paperwork and other needs to make their lives a bit easier."

–Miriam E. Kaufman, Relationship Manager

Our Commitment to You

All this personal attention takes time–sometimes a lot of it. Why are we willing to invest so deeply in you?

We know what your financial situation means to you–it's what makes your family's dreams possible. So this isn't just a job to us. We're very passionate about helping you get to where you want to be.

We truly value the personal relationships we have developed with our clients. But close relationships aren't just the right thing to do. They're smart business. The better we know you, the better the job we can do as your Financial Advisors, helping you make the appropriate choices for reaching your goals.


Chart

Investment Approach

Our investing philosophy is simple but sensible–we want to help maximize your returns with the lowest level of risk possible.

Working together, we can develop a financial approach customized to your precise needs, regardless of the size of your portfolio. We'll work with you to set astute priorities and realistic goals, and to implement the savings discipline and investment strategy to help meet those goals.

A Solid Foundation

Whatever your net worth, we'll customize an asset allocation for you based on the information you provide us.

At our initial meeting, we'll walk you through our detailed "Confidential," our proprietary set of questions, which will help us develop a picture of who you are and what matters to you–both personally and professionally–as well as your family's short-term, medium-term, long-term and retirement goals.

During this conversation, we'll learn about your current financial state, including what you own and what you owe, your insurance coverage, and much more–all vital components for developing the proper asset allocation for your needs.

We dedicate so much time to establishing the appropriate allocation for your situation because it is perhaps the most important factor in helping you achieve your financial goals–more important, in fact, than choosing the specific individual investments.

We'll then use the information from the Confidential to determine how much you'll need to help achieve your retirement goals, pass along wealth to your children, pay for college and so on.

"We have client relationships that go back decades and pride ourselves on always being available for the people who depend on us. Even as our business has grown, our client service has not changed."

–Lee B. Cohn, Senior Vice President, Wealth Advisor

Prudent Investment Selection

We choose investments for our clients based on a thorough evaluation process–consisting of comprehensive research, an assessment of historical performance trends and risk-adjusted returns, and an analysis of mathematical models, among other factors. The investments we choose for your portfolio will be customized to reflect your individual expectations and goals.

While we have a strong track record of selecting appropriate investment ideas, we also work closely with our clients, who frequently share their own investment ideas with us. It's another example of the collaborative spirit we build with our clients. The balance of our financial experience and your unique perspective makes for a powerful combination.

The Right Incentives

All of the investments we choose for our clients are part of an "open architecture" platform. This means we are able to offer a broad range of financial solutions for your portfolio. Our only criterion is whether we believe the investments are the most appropriate ones for your situation.

The Distinction of Morgan Stanley Smith Barney

"We have clients who work with multiple firms, and they tell us that they appreciate that Morgan Stanley Smith Barney has more investment opportunities, a large bond inventory and more buying opportunities–giving them more investment choices."

–Philipp B. Weisskopf, Senior Vice President, Wealth Advisor

Because of our commitment to our clients, we are able to give you a tremendous amount of personal attention. But you'll benefit as well from our relationship with and backing by Morgan Stanley Smith Barney, the nation's largest financial services firm.

We put this combination of small-firm service and big-firm resources to work for our clients.

When we need to obtain information or speak to investment managers on our clients' behalf, the Morgan Stanley Smith Barney name opens doors. Clients also benefit from our access to an unparalleled number of investment platforms, as well as an enormous amount of proprietary research to guide us in placing our clients in the most suitable financial products.

A Team Approach

As Financial Advisors, we rely on a true team approach to working with clients.

While each member of our team has an individual area of experience, we're all qualified to help you, so usually you won't have to depend on just one of us when you need advice, have a question or call for service. We're all available to handle your requests as quickly as possible, and our clients typically develop close relationships with all of our associates over time.

Your Team

Lee B. Cohn

Senior Vice President, Wealth Advisor

Lee is a Senior Vice President, Wealth Advisor and Portfolio Manager. His focus includes customized asset allocations, portfolio management and tax saving strategies. Lee works closely with clients to analyze their individual financial profile and provide realistic solutions for their long-term financial goals. Lee has worked in the financial services industry since 1985. After five years with Prudential Securities as a Senior Vice President, Lee came to Morgan Stanley (now Morgan Stanley Smith Barney) in 2000 and is currently a Chairman's Club Financial Advisor. He graduated from the University of Illinois in 1983 with a B.A. in economics.

Philipp B. Weisskopf

Senior Vice President, Wealth Advisor, CFP®, CIMA®

Philipp is a Senior Vice President, Wealth Advisor and CERTIFIED FINANCIAL PLANNER™ practitioner. He began working for Morgan Stanley (now Morgan Stanley Smith Barney) in 1997 after completing his M.B.A. at Loyola University (Chicago). Before working with individual clients, he served as Branch Manager of Morgan Stanley's Highland Park office for three years. Philipp received his designation as a Certified Investment Management Analyst in 2008, and he graduated from Lawrence University in 1992 with a degree in liberal arts.

Miriam E. Kaufman

Relationship Manager

As the primary client liaison for the Cohn Weisskopf Group, Miriam proactively maintains the team's client relationships. She has worked in the financial services industry since 1999. She joined the team in 2002, arriving with experience as a Registered Sales Assistant at Smith Barney and in institutional municipal bond trading at UBS Warburg. Miriam graduated from Syracuse University in 1994 with a B.S. degree.

Michael A. Oxman

Financial Advisor, CFA®

Michael supports the Cohn Weisskopf Group on many platforms, including research, performance reporting, trading and technical issues. He has been with the team since 2005, when he started as an intern. Michael graduated from Northwestern University in 2006 with a B.A. in economics and holds the Chartered Financial Analyst® designation.

Stacey Ness

Registered Client Service Associate

Stacey has been with Morgan Stanley Smith Barney since 2000. She began her career in the financial services industry in 1995, when she started in commercial banking. Stacey graduated from the University of Illinois in 1995 with a B.A. in psychology.

Eteri Reimer

Senior Client Service Associate

Eteri joined the Cohn Weisskopf Group in 2007 and has been in the brokerage industry since 1999. She attended the School of the Art Institute of Chicago.

Put Time on Your Side

Whatever your financial goals, or the extent of your financial experience, we want to get to know you better and help you achieve your vision for your future. We know that time with our clients is time well spent.

For more information or to set up an introductory meeting, please give us a call at 847-831-6060.

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