

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

May 8, 2023

Tom Williams (CRD #: 4773501)

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 Tom Williams 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 Tom Williams is available on the SEC's website at [www.adviserinfo.sec.gov](http://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:	Tom Williams (b. 1969)
Education:	B.A. in Economics from Trinity College-Hartford; JD in Law from USC Gould School of Law.
Business Background (Past 5 Years):	06/2020 - Present, Managing Director and Head of Outsourced Chief Investment Office (OCIO) Investments within the Global Investment Office 01/2020 - 06/2020, CIO and Managing Member of BlueGreen Capital Management 08/2014 - 12/2019, CIO and lead Portfolio Manager of the Pine Grove funds within Man Group FRM (\$17 billion hedge fund of funds division)
Professional Designations:	Chartered Financial Analyst (CFA) Charter holder.

### 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

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\*519916- BlueGreen Capital Management, LLC; Investment related-Yes; Summit, New Jersey; Investment/Finance/Banking; Sole Proprietor/Owner (proprietor, partner, officer, director, employee, trustee, agent); 10/2009; During business hours: 0; After business hours: 5; Investment Decisions/Advice

#### 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:	Alper Daglioglu
Supervisor Tel:	+1 (212) 296-6807

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

May 8, 2023

**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

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Additional information about SUZANNE E LINDQUIST is available on the SEC's website at [www.adviserinfo.sec.gov](http://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 E 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

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#### Investment-Related Businesses

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No additional business activities to disclose.

#### Additional Compensation

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Supervisor:	Matthew Soriano
Supervisor Tel:	+1 (914) 225 5851

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

May 8, 2023

**Brian 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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### Educational Background and Business Experience

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Name:	Brian Mulley (b. 1977)
Education:	B.S. in Finance from University of Massachusetts Lowell.
Business Background (Past 5 Years):	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:	Matthew Soriano
Supervisor Tel:	+1 (914) 225 5851

# Morgan Stanley

## FORM ADV BROCHURE SUPPLEMENT

May 8, 2023

**KEVIN 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 E KOPCZYNSKI is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

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Name:	KEVIN KOPCZYNSKI (b. 1965)
Education:	HVERFORD 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:	<b>Chartered Financial Analyst® or CFA®</b> 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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#### Investment-Related Businesses

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\*380941- Estate; Investment related No; New York, NY; Executor; Sep 2019; During business hours: 0; After business hours: 2 \*393950 - POA; Power of Attorney (Proprietor, Partner, Officer, Director, Employee, Trustee, Agent); Jan 2020; During Business Hours: 0; After Business Hours: 1.

#### Compensation for Investment Professionals

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#### Additional Compensation

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Supervisor:	Cameron McCarthy
Supervisor Tel:	+1 (212) 296-2055

# Morgan Stanley

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May 8, 2023

Cameron McCarthy (CRD #: 6345907)

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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### Educational Background and Business Experience

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Name:	Cameron 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

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