

Morgan Stanley



Paul Hansen, CFP[®], ChFC[®], CAP[®], CLU[®]
Financial Advisor
Morgan Stanley
150 JFK Parkway, 2nd Floor | Short Hills, NJ 07078
Phone: +1 973-912-7708
Toll Free: +1 800-927-0227

As a Financial Advisor with Morgan Stanley, Paul has over 30 years experience in financial services. He received his MBA from Rutgers University prior to earning certificates including: CERTIFIED FINANCIAL PLANNER[™], (CFP[®]), Charter Financial Consultant[®], (ChFC[®]), Chartered Advisor in Philanthropy[®], (CAP[®]), and Chartered Life Underwriter[®], (CLU[®]). Paul has a diverse background in financial and estate planning as he has worked at Lutheran Brotherhood, Fidelity Investments and Merrill Lynch Trust Company prior to coming to Morgan Stanley. At Merrill Lynch, he was a Senior Philanthropic Consultant assisting Financial Advisors design charitable strategies for their clients. Additionally, he spent 12 years as host, and co-producer, a cable show he created, *You and Your Money*, which was broadcast throughout New Jersey.

Paul is a member of the Society of Financial Service Professionals, the Estate Planning Council of New York City, the Society of Trust and Estate Practitioners, the National Association of Insurance and Financial Advisors, New Jersey Association of Fundraising Professionals and the New York State Society of CPAs. He has been an Associate Trustee of the Sigma Pi Educational Foundation, and board member of the Gift Planning Council of New Jersey. Paul has his BS in Civil Engineering from Valparaiso University.

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