FROM LEFT: Karen Rademeyer, CFP®, Financial Advisor, Workplace Advisor - Equity Compensation; Krista Collver, Registered Associate; Taylor Haire, Registered Associate; John Mitsis, CRPS®, QPFC, CIMA®, First Vice President, Financial Advisor, Corporate Retirement Director, Workplace Advisor - Equity Compensation; Taylor McCullers, CFP®, Financial Advisor; David DeLuca, CFP®, CEPA®, Senior Vice President, Financial Advisor, Workplace Advisor - Equity Compensation

Preparing for the Sale of the Most Important Asset: Your Business

The Sentinel Ponte Vedra Group at Morgan Stanley works to grow and protect clients' wealth.

"Businessowners usually don't start a business thinking about how to exit it, but planning for that transition is essential," says John Mitsis, CRPS®, QPFC, CIMA®, first vice president at The Sentinel Ponte Vedra Group at Morgan Stanley.

Whether pursuing a merger or acquisition, or passing the business to family, these complicated transactions require professional focus.

"Many businesses generate great cash flow but won't survive if something happens to the owner. We deploy strategies that are designed to help increase our client's company value now so their business continues and their family has a plan for the future," adds David DeLuca, CFP®, CEPA®, senior vice president.

As an entire generation approaches retirement, the need for qualified succession planning guidance has never been higher. But with The Sentinel Ponte Vedra Group's help, financial independence is within reach. With full-service capabilities across corporate retirement services, cash management, tax minimization, and succession planning, the group's goal-based approach brings considerable advantages to business owners—especially when the next chapter arrives.

Goal-Based, Relationship-Driven

At The Sentinel Ponte Vedra Group, experienced advisors offer more than just a little know-how. A team of credentialed advisors with an unrelenting thirst for knowledge cares for every client. "We're not generalists," says Mitsis. "We're dedicated to developing our areas of focus to aim for the best outcomes for clients."

With over 60 years of industry experience* serving individuals and institutions, The Sentinel Ponte Vedra Group's credentialed advisors provide thoughtful guidance, goal-focused planning, and client care to help grow and protect what matters most to clients: their business, family, and future.

"Monitor, serve, and protect: That's what a sentinel does, and that's what we do for clients," says Mitsis.

"We work with one goal in mind, and that's to help our clients reach their goals," adds DeLuca. "They expect us to deliver results. We find out what's important to clients and provide skillful planning to help them achieve their goals while managing risk."

With three CERTIFIED FINANCIAL PLANNER™ professionals (Rademeyer, McCullers, DeLuca), a Certified Exit Planning Advisor (DeLuca), a Qualified Plan Financial Consultant (Mitsis), and a Certified Investment Management Analyst® (Mitsis) on hand—plus one of a selected group of Corporate Retirement Directors across Morgan Stanley—the team renders comprehensive plans.

From wealth management to estate planning strategy and philanthropy, The Sentinel Ponte Vedra Group simplifies planning complexities by uniting the seven core pillars of a sound financial future under one process.

"We guide clients through every step and tailor each detail to fit their financial lives. That takes getting to know them and understanding their fears, needs, and desires," Mitsis says. "It's an ongoing, relationship-based process, not a one-time planning discussion. As situations or opportunities arise, we work diligently to fine-tune clients' plans."

"We're intensely passionate about client service and dedicated to helping them achieve their goals," DeLuca concludes.

Morgan Stanley

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*David DeLuca, 29 years; John Mitsis, 21 years; Karen Rademeyer, 10 years.