Morgan Stanley

Julia A. Peloso-Barnes, CFP®, CPM®, CRPC®, ADPA℠
Wealth Advisor, First Vice President
Portfolio Management Director
The Peloso-Barnes Group at Morgan Stanley

Julia founded The Peloso-Barnes Group at Morgan Stanley in order to provide competence, comfort and continuity for clients. Her team is one of the most diverse at Morgan Stanley, she has appeared at the Barrons Top Advisory Teams Summit, and her team has been profiled in Bloomberg Businessweek, Fortune and Money. Julia has also been recognized as a Five Star Wealth Advisor for three consecutive years.

Julia has a love of teaching and a passion for breaking things down in order to understand how they work. Over her career she has observed that many things that can not be measured and analyzed with statistical models have been ignored and/or dismissed. Her experiences have solidified her conviction that people's behavior cannot be accurately predicted with algorithms and statistical models.

Julia earned an M.B.A. at NYU, and has earned and maintains multiple professional accreditations, including CERTIFIED FINANCIAL PLANNER® and Certified Portfolio Manager®. She taught in the CFP program at Pace University for ten years.

Julia lives in Bronxville, NY with her wife Patty. As avid N.Y. Liberty fans they never miss a home game.

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