



Morgan Stanley

Stanek Group Expands Support of NPDA

In a significant show of support, the Stanek Group at Morgan Stanley has upgraded its relationship to a strategic-level collaboration with the NPDA.

The Stanek Group at Morgan Stanley began working with the NPDA in early 2023, and in its expanded role the company aims to provide the association with valuable educational resources and additional financial support.

This will include expanding its already robust webinar programming, as well as issuing “white papers” to provide dealers with valuable insights and knowledge, but perhaps the biggest change is a free offering exclusively for NPDA Dealer Members.

Second Opinion Service: Empowering Dealers to Navigate Financial Landscapes

A key highlight of this collaboration will be a new, Membership benefit: Stanek Group will offer its Second Opinion Service at no cost to all NPDA Dealer Members. This service allows dealers to review their total financial picture with the skilled focus of the Stanek Group’s seasoned financial professionals.

Details of the Second Opinion Service:

- **Tax Efficient Wealth Planning:** Explore strategies to help minimize tax implications for you and your Dealership.
- **Exit & Succession Planning:** Receive guidance on developing and executing an effective exit and succession plan for your Powersports Dealership.
- **Estate Planning Strategy:** Assist in making sure wealth passes to those you care about correctly and successfully.
- **Wealth Protection Strategy:** Safeguard and grow the assets within your Dealership.

“We are very excited about the opportunity to contribute to the financial well-being of NPDA dealers,” said Brad Stanek and Paulina Matel, financial advisors with the Stanek Group at Morgan Stanley.

Bob Kee, Vice Chairman of the NPDA and Dealer Principal of Destination Cycle in Kerrville, Texas, tested the Second Opinion Service and is very supportive and impressed by the work of the Stanek Group.

"My wife and I went through a pilot test of the Second Opinion Service. We learned about strengths and weaknesses of our exit planning strategy, created solutions to deal with shortcomings, and as a result of probing conversations with Paulina and Brad, discovered previously unknown facets of our retirement goals that I believe will serve us well moving forward. Top notch service with a top notch team!"

For more information about the Second Opinion Service, click here:

<https://image.msmail.morganstanley.com/lib/fe9413737562077971/m/1/32b4277c-4415-4bee-9aff-e3d7709a5ec1.pdf>