

# Business Connection



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## Business Spotlight

### Life's big, let's plan for it

**A**t The Henley Furlong Group, relationships with clients extend far beyond investing with an emphasis on building value through an unparalleled level of service and experience. Their commitment to you starts with setting the expectation of receiving a high touch, one-on-one level of service backed by the power of a resource-rich global firm in Morgan Stanley.

Shawn Henley is a Senior Vice President and Portfolio Management Director with Morgan Stanley Wealth Management. He has 36 years of experience helping high-net-worth individuals and their families grow their wealth and preserving it for their legacies. Shawn and his team are based in Morgan Stanley's Pleasanton office; however, they work with many clients throughout the United States.

"Family Life" is Shawn's focus, both personally and professionally, which is why he has dedicated his practice to building relationships with multiple generations of his clients. Together with the client, he will create a comprehensive wealth management plan that will address the many "life stages" which include educational planning for children, investment management for all ages, retirement planning, and once retired, income distribution in the most tax efficient way.

Shawn's greatest satisfaction comes when his clients refer their children and grandchildren, as he strongly believes, "You can never be too young to start investing in the stock market."

Shawn's son Chase is also part of The Henley Furlong Group, and he currently specializes in financial planning and analysis.



Chase Henley and Shawn Henley

Chase was born and raised in Pleasanton and graduated from Amador Valley High School. He left for the east coast to attend Amherst College, a top-ranked liberal arts school in western Massachusetts, where he also played baseball. Chase graduated from Amherst College with a Bachelor of Arts degree in Statistics. Over the course of his four years in school, he was a member of a New England Small College Athletic Conference (NESCAC) championship team, three-time member of the NESCAC All-Academic team, and was elected into the U.S. national statistics honor society, Mu Sigma Rho.

In his free time, Chase loves being outside. His hobbies include hiking, fishing, and golfing. Chase is also an active member of the Pleasanton North Rotary Club where he does volunteer work and gives back to his hometown community.

Learn more about The Henley Furlong Group at Morgan Stanley by calling (925) 730-3859.