The Andre Group at Morgan Stanley

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The Andre Group Team Biographies

Alicia Andre, CFA®

Senior Vice President, Family Wealth Director, Financial Advisor

Alicia founded The Andre Group at Morgan Stanley to offer customized financial advice to successful individuals and families. Combining a macroeconomic perspective with the latest research and wealth management practices, Alicia's experience and steady hand help clients grow, preserve and transition their wealth.

After starting her career in private equity, Alicia became a financial advisor and portfolio manager at Boston Safe Deposit and Trust (now BNY Mellon). She then spent two decades within WilmerHale at Silver Bridge Advisors as an advisor to individuals and families and also served on the firm's investment committee. Alicia joined Morgan Stanley in 2015 to take advantage of the firm's global resources and industry-leading technology. She believes in simplicity, backed by in-depth analysis and outstanding service.

In 2019 Alicia earned Morgan Stanley's Family Wealth Director Designation. This program based on extensive experience working with ultra-high net worth families and provides specialized training and enables her to offer direct access to the advanced resources needed to help affluent families address the complex, multigenerational challenges of managing significant wealth. This includes knowledge and experience in wealth transfer, family dynamics, philanthropy, asset allocation, manager selection and other important areas of concern.

Alicia earned both a B.S. in Business Administration and Management and an M.B.A. in Finance at the Rochester Institute of Technology. Her Chartered Financial Analyst® designation underscores her experience, knowledge and professional integrity.

Alicia and her husband reside in Concord, MA. They have two grown children. Alicia enjoys reading, surfing, sailing, playing the banjo, running and spending time with family and friends.

The Andre Group Team Biographies

Lindsay Pazdan, CFP®

Vice President, Financial Advisor

Lindsay works with clients to help them grow and manage their wealth, and shift seamlessly from wealth accumulation to wealth preservation, and into retirement. Lindsay also works closely with clients to help educate and guide them through important financial decisions as they begin the financial planning process. In today's fast-paced global markets, clients appreciate her disciplined approach to investing, informed advice and recommendations.

Lindsay previously worked at Silver Bridge Advisors, where she focused on trading domestic equities, was a member of the investment team and also served on the firm's Asset Allocation Committee. She began her career as a Senior Client Associate at Lehman Brothers, which underscores her commitment to exceptional service.

Lindsay earned a B.S. in Finance from Fairfield University. She holds the CERTIFIED FINANCIAL PLANNER™ designation, the industry's gold standard for financial planning that demands hundreds of hours of classroom time and ongoing re-certification.

Lindsay resides in Dover, MA with her husband and two children. She enjoys skiing, Pilates and being active outdoors.

Disclosures

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