

Candidate Profile — District Committee Election

Candidate Name: Charles Lambert White III

Title: Managing Director/Complex Director

Firm: Morgan Stanley

Candidate Biography and Personal Statement

Charles (Bert) White is the Managing Director for the Boca Raton Complex (2007-Present) for Morgan Stanley overseeing 142 Financial Advisors with \$17.5 billion of client assets. Prior to this appointment, Bert was the Director of the Omaha, Nebraska market for Morgan Stanley Smith Barney (2004-2007) managing 50 Financial Advisors with \$4 billion of client assets. Bert started his career as a Financial Advisor for 10 years in Atlanta overseeing \$105,000,000 of client assets.

I believe my background would provide the committee with a wide range of experiences which could help shape our industry. If given the opportunity I will be a valuable committee member and contributor.

Optional Links:

Link to personal website, resume or CV: _____

Link to YouTube video: _____