

Steven Ploder Managing Director, Financial Advisor Morgan Stanley



As a Managing Director and Senior Portfolio Management Director with Morgan Stanley, Steve Ploder's primary focus is working one-on-one with select ultra-high net worth families and institutions. He creates and maintains long-term financial plans that are tailored to be transparent and properly diversified while stressing tax efficiency. Steve's extensive financial background allows him the flexibility to utilize all financial instruments to capitalize on current market volatility and market anomalies. Steve has over 25 years of experience in the financial industry, beginning his career at Deloitte & Touche (New York) and spending seven years at

Goldman Sachs working with foreign currency options and other asset classes in New York and London. He continued working with ultra-high net worth families and institutions at Lehman Brothers and Credit Suisse. Currently, he is a member of Morgan Stanley's prestigious President's Club, an elite group of the firm's top financial advisors. Steve has also been named to the Forbes Best-in-State Wealth Advisors list for 2019, 2020, 2021, 2022, and 2023.

Originally from Connecticut, Steve has lived in the Chicago area for 20 years and currently resides in Barrington, Illinois with his wife and three children. In his spare time Steve enjoys coaching his children's football and soccer teams, and is an avid fly fisherman.

EDUCATION:

Northwestern University
MBA, 2002

Lehigh University
B.S. Accounting, 1991

CERTIFICATIONS:

CFP®, CPA

WORK HISTORY:

Morgan Stanley	2015 - Present
Credit Suisse	2007 - 2015
Lehman Brothers	2001 - 2007
Goldman Sachs	1994 - 2001
Deloitte & Touche	1991 - 1994



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UNIVERSITY

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