



**Lisa Shalett**

Wealth Management Chief Investment Officer & Head of the Global Investment Office  
Morgan Stanley Wealth Management

Lisa Shalett is chief investment officer and head of the Global Investment Office for Morgan Stanley Wealth Management and a member of both the Global Investment Committee and the Wealth Management Operating Committee. She works to develop portfolio solutions that leverage the firm's strategic and tactical asset allocation advice to meet client goals delivered through both scaled and customized solutions. As part of her role, Lisa leads the development of all asset allocation models, global investment due diligence and portfolio analytics. She also has responsibility for overseeing the Global Investment Committee's models and Outsourced Chief Investment Office mandates, which collectively have more than \$100 billion in assets under management.

In addition, Lisa is responsible for Morgan Stanley Wealth Management thought leadership and publishes special reports on topics of importance for practitioners and clients.

Prior to joining the firm in September 2013, Lisa served as chief investment officer of Bank of America Merrill Lynch Global Wealth Management. Previously, she held several senior roles at Alliance Bernstein during her 18-year tenure with the firm, including chairman and chief executive officer of Sanford C. Bernstein, LLC, and served as chief investment officer and head of Alliance Growth Equities. Lisa holds a dual Sc.B. degree in applied mathematics and economics from Brown University and an MBA from Harvard Business School. She is a Henry Crown fellow of the Aspen Institute and a founding member of the Financial Fellowship.