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## Team Biography



**Barbara Y. Yee,**  
**CPWA®, CFP®, CFA®**  
*Managing Director*

- *Family Wealth Director*
- *Senior Portfolio Management Director*
- *International Client Advisor*
- *Certified Private Wealth Advisor*
- *Chartered Financial Analyst®*
- *Member of Morgan Stanley Chairman's Club in 2021*

Barbara Yee is a Managing Director and founder of The NY Pine Group at Morgan Stanley. With over 20 years of experience in the financial services industry, she works with global private-owned enterprises, executives, family offices to develop holistic, cross-border solutions, wealth accumulation, preservation and wealth transfer for domestic clients and clients in China and Asia. Access Morgan Stanley's expertise in investment banking, her primary focus is to help global high net worth families develop highly customized pre-liquidity planning solutions, tax and trust planning, wealth transfer strategies to multi generation and private foundation, and access Morgan Stanley's global expertise in family wealth solutions and investment banking.

Barbara began her career on Wall Street working with institutional clients and high net worth individuals and families. Prior to starting her tenure as a wealth advisor, Barbara was a director at AIG where she managed a \$270Bn portfolio. Her team also developed sophisticated investment strategies to effectively manage risk in volatile market conditions. She draws from her wealth of knowledge and experiences to guide her clients in making the right decisions to achieve their personal and professional goals.

Barbara was interviewed by Barron's and the article published in Wall Street Journal in July 2020. She was named to Forbes Top Women Wealth Advisors in 2021 and 2020, Forbes Best-In-State Wealth Advisors in 2021 and 2020, and Barron's Top 100 Women Financial Advisors in 2020 and 2019.

Barbara currently resides in Manhattan with her husband and two daughters. She is actively involved with community and non-profit organizations, having previously held board positions with Hamilton-Madison House, China Aids Fund, American Cancer Society NY, and Lower Manhattan YMCA. Her hobbies include golf, skiing and snowboarding. Barbara holds M.B.A. in Finance & Accounting from Columbia University, and B.S. and M.S. degrees in Chemical Engineer with a full scholarship from Cooper Union, New York City.