

# Morgan Stanley

Morgan Stanley is proud to congratulate

## 545 Group

Named one of *Forbes'* America's Top  
Wealth Management Teams

Being recognized as a top wealth management team on this prestigious industry list is a testament to your experience and dedication to your clients' financial future.

Thank you for the work you do each day to deliver the Morgan Stanley Client Experience® and for carrying forward the high standard of excellence at our firm.

### **545 Group at Morgan Stanley Private Wealth Management**

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Congratulations to Our 2023

Forbes America's Top Wealth Management Teams

Morgan Stanley

Source: Forbes.com (November 2023) *Forbes* America's Top Wealth Management Teams ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with *Forbes* (the publisher) during the period from 3/31/22 - 3/31/23. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of SHOOK Research LLC and this ranking may not be representative of any one client's experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or *Forbes*. For more information, see [www.SHOOKresearch.com](http://www.SHOOKresearch.com).