

Morgan Stanley

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545 Group

Named one of *Forbes'* Best-In-State
Wealth Management Teams

Being named to the *Forbes'* 2024 Best-In-State Wealth Management Teams list is a testament to your experience, focus, and dedication to your client's financial future.

Thank you for the work you do each day and for carrying forward the standard of excellence at our firm.

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Congratulations to Our 2024

Forbes Best-In-State Wealth Management Teams

Morgan Stanley

Source: Forbes.com (Jan 2024) 2024 *Forbes* Best-In-State Wealth Management Teams ranking awarded in 2024. 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 Financial 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 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.

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