



Annie Strout

First Vice President

Corporate Retirement Director, Financial Wellness Director

Financial Planning Specialist, Portfolio Manager

Financial Advisor

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Annie has a bachelor's degree from the University of Vermont where she graduated in the top of her class as a John Dewey Honors College Scholar and played for the Women's Division I Lacrosse Team. She joined Morgan Stanley after working as a financial services professional in the insurance industry and has been with the firm for just shy of a decade. She proudly holds the titles of Corporate Retirement Director and Financial Wellness Director and is a First Vice President, Financial Advisor at Morgan Stanley.

Annie's areas of focus are on comprehensive financial planning and 401(k) and retirement plan consulting for individuals, families, corporations and non-profits. As a Qualified Plan Financial Consultant (QPFC) she works closely with board members and investment committees to provide consulting, benchmarking, ongoing investment services, and education for both plan sponsors and participants. As a Financial Planning Specialist, she often works one-on-one with clients, helping them to prepare for their future with holistic planning.

Integrity and professionalism are the cornerstones of her practice and she seeks to build a strong level of trust with her clients by working closely with them throughout the relationship. She finds the most rewarding part of her job is forming meaningful relationships with clients and working with them throughout their life stages. Given her experience, she has the background to work with every type of client, and is a valuable resource to individuals across the investment spectrum--from those just starting to chart their course in the investment world to seasoned investors with highly complex and sophisticated financial needs.

In 2017, 2019, and 2020 Annie was named to the firm's Pacesetter's Club, a global recognition program for Financial Advisors who, early in their career have demonstrated the highest professional standards and first-class client service. In 2018, 2019 & 2020, Annie was named to the National Association of Plan Advisors (NAPA) list of Top Women Advisors.

In 2024 Annie and the team were recognized by Forbes as one of the top Wealth Management Teams in the state of Vermont and named to NAPA's Top DC Advisor Teams.

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2018-2020 NAPA's Top Women Advisors & 2024 NAPA's Top DC Advisor Teams

Source: napa-net.org awarded in 2018-2024. Each ranking was determined based on an evaluation process conducted by NAPA between Aug of the year prior to the award issuance - Aug of the year the award was given. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to NAPA to obtain or use the ranking. Nominations from the list were provided by NAPA Broker-Dealer/RIA Firm Partners. Nominees must be women retirement plan advisors with their own book of business and less than 40 years of age. Nominees were required to submit responses to an application comprised of a series of quantitative and qualitative questions about their experience, size and composition of their practice, awards and recognitions, and industry contributions, which were then reviewed by a panel of senior advisor industry experts, who, based on those criteria, and following a broker-check review, selected the top young advisors. Ratings are based on the opinion of NAPA and may not be representative of any one client's experience nor indicative of the advisor's future performance. [Awards Disclosures](#)

2024 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Awarded Jan 2024) Data compiled by SHOOK Research LLC based for the period from 3/31/22-3/31/23.

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