

JANUARY, 2026

The Oaks Group Named to Forbes Magazine's Best-In-State Wealth Management Teams

Westlake Village, CA - Morgan Stanley (NYSE: MS) today announced that The Oaks Group based in Westlake Village, has been named to Forbes Magazine's 2026 list of America's Best-In-State Wealth Management Teams.

The Forbes Best-In-State Wealth Management Teams ranking was developed by SHOOK Research and is based on in-person, virtual, and telephone due diligence meetings to measure best practices, client retention, industry experience, credentials, review of compliance records, firm nominations, and quantitative criteria – such as assets under management and revenue generated for their firms.

"I am pleased that The Oaks Group is representing Morgan Stanley," commented Brian Krueger, Complex Manager of Morgan Stanley's Westlake Village office. "To be named to this list recognizes The Oaks Group's professionalism and dedication to the needs of their valued clients."

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

2026 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Awarded January 2026). This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period 3/31/24–3/31/25. 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, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, 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.

© 2026 Morgan Stanley Smith Barney LLC. Member [SIPC](#).

CRC# 5070011 01/26

###