

JANUARY, 2023

Perry Wealth Management Named to Forbes Magazine's Best-In-State Wealth Management Teams

Indianapolis, IN - Morgan Stanley (NYSE: MS) today announced that [NAME OF TEAM] based in [Insert name of city], has been named to Forbes Magazine's 2023 list of America's Best-In-State Wealth Management Teams.

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 Perry Wealth Management is representing Morgan Stanley," commented Michael Simeone, Complex Manager of Morgan Stanley's Great Lakes office. "To be named to this list recognizes Perry Wealth Management's professionalism and dedication to the needs of their valued clients."

Morgan Stanley Private Wealth Management, a division of Morgan Stanley Smith Barney LLC, provides a range of investment services to ultra-high net worth individuals, families and related institutions

Morgan Stanley (NYSE: MS) is a leading global financial services firm providing investment banking, securities, wealth management and investment management services. With offices in more than 41 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals. For further information about Morgan Stanley, please visit www.morganstanley.com.

Source: 2023 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Jan 2023) 2023 Forbes Best-In-State 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 3/31/21 – 3/31/22. 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.

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