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## The Oaks Group Named to Forbes List of Top 100 Wealth Management Teams in America – High Net Worth

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**[New York, NY]** - Morgan Stanley (NYSE: MS) today announced that The Oaks Group, based in Westlake Village, has been named to Forbes Magazine's 2023 list of America's Top 100 Wealth Management Teams. The Oaks Group ranked #20 in America and is the highest ranked team in the state of California.

Below is the Forbes link for America's Top Wealth Management Teams – High Net Worth.

[America's Top Wealth Management Teams High Net Worth 2023 \(forbes.com\)](https://www.forbes.com/advisor/wealth-management/top-100-wealth-management-teams-in-america-2023/)

Financial advisors Seth Haye, Katie DuBois, and Duncan Hizzey oversee more than \$1.8B\* for clients of The Oaks Group. While located in Westlake Village, CA, the team represents clients in more than 40 states across the US. The Oaks Group, a boutique wealth management practice comprised of eight team members, focuses on custom financial planning and asset management for wealthy families. Group Director Elisa Decker, with 37 years of experience with the firm, oversees operations for the practice which includes team members Clint Spivey, Stephanie Hartmire, Griselda Hernandez, and Jason Tran.

"I am thrilled and grateful that Forbes has recognized the hard work of this team," commented Seth Haye, Managing Director and senior partner of The Oaks Group. "We love what we do, and we are committed to the highest level of excellence for our clients. It's a tremendous honor to be named among the Top 100 Wealth Management Teams in America and speaks to the caliber of clients we're fortunate to represent."

Forbes Top 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.

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.

**Source: [Forbes.com](https://www.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).*

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\*As of 11/13/23

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