

APRIL 21, 2020

## Sueanne L. Schulman Named to Forbes Magazine's "Top Women Wealth Advisors"

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**New York** –Morgan Stanley announced today that Sueanne L. Schulman, CFP, a Senior Vice President, Financial Advisor in the Firm's 522 Fifth Avenue Wealth Management office, has been named to Forbes Magazine's list of Top Women Wealth Advisors for 2020, listed on [forbes.com](https://forbes.com).

Forbes' "Top Women Wealth Advisors" is a select group of individuals who have a minimum of seven years of industry experience. The ranking, developed by Forbes' partner SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors and weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews.

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.

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Source: Forbes.com (April, 2020). Top Women Wealth Advisors ranking was developed by SHOOK Research and 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 because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. Neither Forbes nor SHOOK receives compensation from any party, including Morgan Stanley Smith Barney LLC, nor its Financial Advisors or Private Wealth Advisors in exchange for the ranking. For more information: [www.SHOOKresearch.com](https://www.SHOOKresearch.com)

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