Morgan Stanley

FOR IMMEDIATE RELEASE

August 2026

Matthew Berman Named to Forbes Magazine's List of Top Next-Gen Wealth Advisors

ATLANTA - Morgan Stanley (NYSE: MS) today announced that Matthew Berman, an Executive Director, Financial Advisor in the Firm's Atlanta Wealth Management office, has been named to Forbes Magazine's list of Top Next-Gen Wealth Advisors.

The Forbes listing is a select group of individuals who were born in 1981 or later, have a minimum of four years of industry experience and lead, or are viewed as potential leaders of, their teams. The ranking, developed by Forbes' partner SHOOK Research, is based on an algorithm of qualitative and quantitative data, weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews.

"I am pleased that Matthew Berman is representing Morgan Stanley," commented Richard Vaughan, Market Manager of Morgan Stanley's Atlanta office. "To be named to this list recognizes Matthew's professionalism and dedication to the needs of his 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 America's Top Next-Gen Wealth Advisors & Top Next-Gen Wealth Advisors Best-in-State
Source: Forbes.com (Awarded August 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 3/31/25-3/31/26. 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 to evaluate each Financial Advisor qualitatively, a major component of a ranking algorithm that includes client impact, industry experience, client retention, review of best practices and 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.

CRC 5715644 08/2026

# # #

Media Relations: Richard Vaughan, 770-698-1660