

April, 2024

The Bromberg Group Named to Barron's 2024 List of Top 250 Private Wealth Management Teams

San Francisco, CA -- Morgan Stanley (NYSE: MS) announced today that The Bromberg Group at Morgan Stanley has been named to Barron's list of America's Top 250 Private Wealth Management Teams.

The "Barron's Top 250 Private Wealth Management Teams" is a select group of wealth management teams that focus on serving individuals and families. The teams are ranked on a variety of factors, including their size and shape, the regulatory records and credentials of their members and the resources they have at their disposal to serve their client bases.

"As a firm, we take pride in the integrity and professionalism of our Private Wealth Advisors and we congratulate The Bromberg Group on being named to this prestigious list," commented Steve Bearden, Manager of Morgan Stanley Wealth Management's San Francisco office. "The listing recognizes an elite group of financial professionals who are dedicated to providing clients with exceptional services."

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, investment management and wealth management services. With offices in more than 41 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals. For more information about Morgan Stanley, please visit www.morganstanley.com.

2024 Barron's Top 250 Private Wealth Management Teams

Source: Barron's (May 2024) Barron's Top 250 Private Wealth Management Teams ranking awarded in 2024. This ranking was determined based on an evaluation process conducted by Barron's for the period from Jan 2023-Dec 2023. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on an 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 assessment of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

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