

Morgan Stanley

April, 2023

Jesse Bromberg Named to Forbes Magazine's List of Best-in-State Wealth Advisors

San Francisco - Morgan Stanley (NYSE: MS) today announced that Jesse Bromberg, a Managing Director, Wealth Advisor in the Firm's San Francisco Wealth Management office, has been named to Forbes Magazine's 2023 list of Best-in-State Wealth Advisors.

Forbes' Best-in-State Wealth Advisors list comprises 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.

"I am pleased that Jesse Bromberg is representing Morgan Stanley," commented Steven Bearden, Branch Manager of Morgan Stanley's San Francisco office. "To be named to this list recognizes Jesse's professionalism and dedication to the needs of [his/her] 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.

2023 Forbes America's Top Wealth Advisors and Best-In-State Wealth Advisors

Source: Forbes.com. Forbes America's Top Wealth Advisors and Best-In-State Wealth Advisors rankings awarded in 2023 and published in April 2023. Data compiled by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) from 6/30/21 - 6/30/22. Opinions are SHOOK's who evaluated Advisors on both quantitative and qualitative factors including client retention, industry experience, review of compliance records, firm nominations, assets under management and revenue generated for their firms. Rankings do not reflect any client experience. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Forbes/SHOOK to obtain or use the ranking. For more information, go to ms.com/topadvisors. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

© 2023 Morgan Stanley Smith Barney LLC. Member SIPC.

Morgan Stanley Private Wealth Management is a division of Morgan Stanley Smith Barney LLC.

CRC 550272 04/23