

Morgan Stanley

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Jesse Bromberg Named to Forbes Magazine's America's Top Wealth Advisors

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

Forbes' Top 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 Steve 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 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.

Morgan Stanley (NYSE: MS) is a leading global financial services firm providing investment banking, securities, wealth management and investment management services. With offices in more than 42 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions, and individuals. For further information about Morgan Stanley, please visit www.morganstanley.com.

2024 Forbes America's Top Wealth Advisors & Best-In-State Wealth Advisors

Source: Forbes.com (April 2024) 2024 Forbes America's Top Wealth Advisors and Best-In- State Wealth Advisors rankings awarded in 2024. 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 from 6/30/22-6/30/23. 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 Financial 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 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.

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