

Forbes

BEST-IN-STATE

WEALTH MANAGEMENT TEAMS 2024

SHOOK® RESEARCH

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Our team was recently honored to receive recognition from Forbes on their 2025 list of Best-In-State Wealth Management Teams - Private Wealth in New York City.

This accolade is a reflection of our commitment to you, our clients. We strive to deliver a high quality of service, personal attention, and customized solutions to help you navigate a complex financial world. Your ongoing support and belief in our team has been instrumental in reaching this milestone.

We want to thank you for your relationship and continued loyalty. Without your support, none of this would have been possible.

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at Morgan Stanley PWM**

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Named to the 2025 Forbes Best-In-State Wealth Management Teams Ranking

Source: Forbes.com (Awarded Jan 2025) Data compiled by SHOOK Research LLC based for the period from 3/31/23–3/31/24.

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Left to Right: Anthony Dertouzos, Victor Micoretti, Pankti Mehta, Janine Millensifer, Carolyn Hernandez, Ryan Buser, Ashley Kaplan and Tara Feenaghty

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