Morgan Stanley

FOR IMMEDIATE RELEASE

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Alfred R. Bozzo Jr. Named to Forbes Magazine's List of Best-in-State Wealth Advisors

Washington, D.C. - Morgan Stanley (NYSE: MS) today announced that Alfred R. Bozzo Jr., CFP® , a Senior Vice President, Portfolio Management Director, Lending Specialist, Financial Advisor in the Firm's Washington, DC Wealth Management office, has been named to Forbes Magazine's 2022 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 Alfred is representing Morgan Stanley," commented Jed P. Woelfle, Complex Manager of Morgan Stanley's Washington, DC office. "To be named to this list recognizes Alfred'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.

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 41 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.

2022 Forbes Best-in-State Wealth Advisors
Source: Forbes.com (April, 2022) Forbes Best-in-State Wealth Advisors ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each 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 not indicative of future performance or representative of any one client's experience. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Forbes or SHOOK Research in exchange for the ranking. For more information: www.SHOOKresearch.com.

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