

March, 2025

## David Javaheri Named to Barron's "Top 1,200 Financial Advisors"

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Wellesley, MA, March, 2025 – Morgan Stanley announced today that David Javaheri, a Managing Director, Financial Advisor in the Firm's Wellesley Wealth Management office, has been named to Barron's list of "America's Top 1,200 Advisors: 2025 State-by-State."

The "Barron's Top 1,200 Advisors" is a select group of individuals who are screened on a number of criteria. Among factors the survey takes into consideration are assets under management, revenue produced for the Firm and quality of service provided to clients.

David Javaheri was ranked 15<sup>th</sup> in Massachusetts.

"I am extremely proud that David is representing Morgan Stanley Wealth Management on this list," commented David Swartz, Market Manager of Morgan Stanley's Wellesley office. "Competition is steep to be selected for this list, and those who make the cut represent a very high level of achievement in serving their clients' wealth management needs."

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.

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### 2025 Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's (Awarded March 2025) This ranking was determined based on an evaluation process conducted by Barron's for the period Oct 2023-Sept 2024. 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 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 right