

APRIL, 2024

## Yangchen “YC” Lama Named to Forbes Magazine’s “Top Women Wealth Advisors Best-In-State” List

---

**New York** – Morgan Stanley announced today that Yangchen Lama, a Executive Director, Family Wealth Director, Portfolio Management Director, Wealth Advisor in the Firm’s Beverly Hills Wealth Management office, has been named to Forbes Magazine’s list of Top Women Wealth Advisors Best-In-State for 2024, listed on [forbes.com](https://forbes.com).

Forbes’ “Top Women Wealth Advisors Best-In-State” is 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 Yangchen is representing Morgan Stanley,” commented Ken Sullivan, Complex Manager of Morgan Stanley’s Beverly Hills office. “To be named to this list recognizes Yangchen’s experience, professionalism and dedication to the needs of her 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.

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

Source: Forbes.com (February 2024) 2024 Forbes America's Top Women Wealth Advisors & Forbes Top Women Wealth Advisors Best-In- State 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 9/30/22-9/30/23. 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](http://www.SHOOKresearch.com).

© 2024 Morgan Stanley Smith Barney LLC. Member [SIPC](https://www.sipc.org). CRC# 6198379 02/24