

Why Choose Morgan Stanley Wealth Management?

For over 88 years, Morgan Stanley has been helping clients build, preserve and manage wealth at every stage of life.

... IN INVESTMENT ADVISORY,
with \$2.1 trillion+ in client assets ⁽¹⁾

...COMPREHENSIVE RESEARCH DEPARTMENT ⁽⁵⁾
with 500+ analysts covering 3,800+ stocks

... IN SECURITIES BASED LENDING ⁽²⁾

...IN ALTERNATIVE INVESTMENTS,
with ~\$190 billion in assets under management ⁽⁴⁾



...AWARD WINNING RISK PLATFORM ⁽³⁾

SCALE AND STABILITY

\$5.5+ trillion in client assets under management, our size and scale help us take you where you want to go.⁽¹⁾

1. Morgan Stanley Quarterly Report, 1Q24.

2. Q4 2023 Securities Based Lending McLagan Survey – 6 Firm Report. Based on both Non-Purpose Lending and total SBL balances.

3. Celent Model Wealth Manager 2024 Award for for Data & Analytics

4. Morgan Stanley Wealth Management Alternative Investments Group. As of March 31, 2024.

5. Morgan Stanley Global Research. As of May 2024.

For more on methodology & criteria for awards, see end of this material.