

April, 2025

The Oaks Group Named to Barron's 2025 List of Top 250 Private Wealth Management Teams

Westlake Village, CA -- Morgan Stanley (NYSE: MS) announced today that The Oaks Group at Morgan Stanley has been named to Barron's list of America's Top 250 Private Wealth Management Teams.

The "Barron's Top 100 Private Wealth Management Teams" is a select group of wealth management teams that focus on serving individuals and families. The teams are ranked on a variety of factors, including their size and shape, the regulatory records and credentials of their members and the resources they have at their disposal to serve their client bases

"As a firm, we take pride in the integrity and professionalism of our Private Wealth Advisors and we congratulate The Oaks Group on being named to this prestigious list," commented Brian Krueger, Manager of Morgan Stanley Wealth Management's Westlake Village office. "The listing recognizes an elite group of financial professionals who are dedicated to providing clients with exceptional services."

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, investment management and wealth management services. With offices in more than 42 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals. For more information about Morgan Stanley, please visit www.morganstanley.com.

2025 Barron's Top 250 Private Wealth Management Teams

Source: Barron's (Awarded May 2025). This ranking was determined based on an evaluation process conducted by Barron's for the period Jan 2024-Dec 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 this ranking 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 rights reserved.

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