

The Robert L Johnson Group at Morgan Stanley, recipient of the prestigious *Forbes Best-In-State Wealth Management Teams award**, works with High-Net-Worth investors who are seeking wealth planning with concierge treatment. With a combined 75+ years of experience, our family-built team emphasizes excellence in the comprehensive pursuit of your financial goals and objectives.

Robert L. Johnson, Executive Director and Financial Advisor, is the Founder of *The Robert L Johnson Group*. He is a Brigham Young University (BYU) Alumnus with degrees in Marketing, Accounting, and Economics. Mr. Johnson has been awarded many titles during his 45+ year career, including: Certified Portfolio Manager, Alchemist, Senior Vice President, as well as Membership in the Master's, President's, and Chairman's Councils. Robert manages a diverse clientele with responsibilities centered in Portfolio and Wealth Management for institutions and High-Net-Worth individuals. Included within these duties, he has represented Smith Barney's Middle Markets Division advising municipal portfolios. He is one of Morgan Stanley's top producers in the Consulting Services Group (CSG) with a Senior Consultants Council distinction. Today, Mr. Johnson's principal business focuses on discretionary fee-based portfolio management of Global Securities. His licenses include: NYSE Series 7, 8, 9 and 10, FINRA State Law Series 63 and 65, Life / Variable Insurance, NMLS #1395641, and is located in the Westlake Village, CA office.

Miles C. Johnson, Associate Vice President, Financial Advisor, and Financial Planning Specialist (FPS) in *The Robert L Johnson Group*, has over 17 years of experience in the financial services industry. He graduated from California State University Northridge (CSUN) with a Bachelor of Arts in Media Theory and Film Criticism, concentrating in Media Business and Law. During Miles' time working with Morgan Stanley Smith Barney, he was personally mentored by his father, as well as many of the industry's most capable and respected veterans. He has served in numerous capacities: including advisory, operations, research, and sales support. He was instrumental as a technology advisor/trainer during the merger of Smith Barney and Morgan Stanley, where he provided the Firm training and technology support, as well as guidance for future improvements. Miles is a member of the Pacesetter Club at Morgan Stanley, reaching the top tier of advisors amongst his peers. His licenses include: NYSE Series 7, FINRA State Law Series 66, Life / Variable Insurance, NMLS #1615195, and is located in the Las Vegas, NV office.

Robert W. Johnson is a Financial Advisor and Financial Planning Specialist (FPS) with *The Robert L Johnson Group* at Morgan Stanley, joining the team in 2018 from Morgan Stanley's Client Advisory Center. Robert has distinguished himself from his peers as a member of the Pacesetters Club from 2021-2024. He graduated from Colorado State University (CSU) with a Bachelor of Science in Business Administration with a Finance concentration, and double option in both Investment Analysis and Corporate Finance. While attending CSU, Robert established a successful social media marketing business. As an influencer, he managed corporate relationships through product analysis and content creation in support of the marketing needs of many companies. Robert also enjoys cooking, and spending time with his family exploring the outdoors. His licenses include: NYSE Series 7, FINRA State Law Series 66, Life / Variable Insurance, NMLS #1822013, and is located in the Loveland, CO office.

Justin Conant is a Registered Client Service Associate with *The Robert L Johnson Group* at Morgan Stanley in Westlake Village, California. He graduated Magna Cum Laude from California State University Northridge (CSUN) with a Bachelor of Science in Financial Analysis. Prior to attending CSUN, Justin was designated Summa Cum Laude at Moorpark College. He began his career in Private Client Banking with JP Morgan Chase before joining his current team here at Morgan Stanley. Justin prides himself on spending quality time with friends and family. Outside of the office, he participates in sports analytics and enjoys attending musical events. His licenses include: NYSE Series 7, FINRA State Law Series 66, Life/ Variable Insurance, and NMLS # 1932113.

We can be reached at **800-618-2075** And have offices in **Westlake Village CA, Las Vegas NV, & Loveland CO**
2024 Forbes Best-In-State Wealth Management Teams. Source: Forbes.com (Awarded Jan 2024) Data compiled by SHOOK Research LLC based for the period 3/31/22-3/31/23. See page 2 for criteria and methodology.

The individuals mentioned as the Portfolio Management Team are Financial Advisors with Morgan Stanley participating in the Morgan Stanley Portfolio Management program. The Portfolio Management program is an investment advisory program in which the client's Financial Advisor invests the client's assets on a discretionary basis in a range of securities. The Portfolio Management program is described in the applicable Morgan Stanley ADV Part 2, available at www.morganstanley.com/ADV or from your Financial Advisor.

Source: Forbes.com (Jan 2024) 2024 Forbes Best-In-State Wealth Management Teams ranking 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 3/31/22–3/31/23. 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.

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