Morgan Stanley

Robert L. Johnson, Executive Director and Wealth Advisor, is a Certified Portfolio Manager with Morgan Stanley in Westlake Village, California. He is also the founder of ***The Robert L Johnson Group*** at Morgan Stanley, which is a recipient of the prestigious ***Forbes Best-In-State Wealth Management Teams* award*.**

Robert started his career in the Securities Industry in 1978 after serving as a representative and leader/trainer for the Church of Jesus Christ of Latter-Day Saints in Argentina, South America from 1974 to 1976. After his time in Argentina, he graduated from Brigham Young University with a composite degree in Marketing, Accounting and Economics. While at BYU, he was awarded an academic scholarship, and has since returned as a mentor and speaker in the exclusive Marriott School of Business Executive Lecture Series. While completing his final year at BYU, Robert began his career in the Financial Services Industry as a General Agent, and Registered Representative for Investors Life Insurance Company and North America Management, Inc.

In 1981, he became an Account Executive for Smith Barney Harris Upham Inc. After achieving the number one position in his class, he received several prestigious awards including Pacesetter II, Constellation, Powers Prep, Rain Maker, and Top 100 Club. From 1981 to 2024, he has been awarded the following titles and advancements: Account Executive, Senior Account Executive, Second Vice President, Vice President, First Vice President, Senior Vice President, and Executive Director.

In 1988, at Smith Barney's request, he participated in their Executive Sales Leadership Management Training Program. Included therein were qualifications for the New York Stock Exchange Series 8 Supervisory License, as well as opportunities in Smith Barney Firm Management. In 1991, Mr. Johnson was one of the firm's first representatives to take part in Smith Barney's proprietary-discretionary securities Portfolio Advisory Program. He completed formal portfolio management training and received the Certified Portfolio Manager designation during this period. In addition, he was given the assignment of serving as one of Smith Barney's exclusive Middle Markets Consultants, specializing in the development and supervision of municipal and institutional accounts.

Robert provides comprehensive financial planning advice while managing a diverse clientele with his current responsibilities centered in Private Portfolio Management for high-net-worth individuals and institutions. He is one of the top producers with Morgan Stanley in the Consulting Services Group and has been a member of the Senior Consultants Council. His principal business emphasis is on discretionary fee basis portfolio management, and he has been awarded the Alchemist designation as well as Master's, President's, and Chairman's Council membership from 1994 to present time.

On a personal note, Robert is married with three sons. He has enjoyed an active lifelong participation in various martial arts and has earned the rank of third-degree black belt. He is also a qualified SCCA and NHRA competitive driver, which was accomplished while participating in various motorsports. His interest in the motorsports includes classic auto restoration, and the ownership and restoration of an NCRS Top-Flight award winning 1966 Corvette 427, as well as a magazine featured 1973 Plymouth Road Runner.

Robert and his team continually strive for excellence and look forward to having the opportunity of serving and assisting you in achieving your wealth management goals. He can be reached at **(800) 618-2075** or robert.johnson@morganstanley.com and is located at **100 N. Westlake Blvd. #200 Westlake Village, CA 91362**.

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.

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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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