## Morgan Stanley



**Miles C. Johnson** is an Associate Vice President, Financial Advisor, and Financial Planning Specialist (FPS) with *The Robert L. Johnson Group* at Morgan Stanley, recipient of the prestigious *Forbes Best-In-State Wealth Management Teams* award\* for two years in a row (2024 & 2025). He began his financial services career working as a sales assistant for Smith Barney in 2007. Over the next 17 years, he 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's technology platform by providing in office training and technology support.

While working with Smith Barney, he simultaneously obtained a Bachelor of Arts degree in Media Theory and Philosophy with an emphasis on Media Law from California State University Northridge. As a student, his scholastic achievements were honored throughout his time at the university by achieving a place on the Dean's List for the entire duration of his schooling.

In addition to his university education, Miles became an alumnus of the National Outdoor Leadership School, a.k.a. NOLS, for their Semester in the Rockies, where he studied leadership skills and risk assessment strategies. Their program is famous for contribution to the leadership training of NASA's astronauts, including the Columbia Shuttle Crew in 2001.

Miles grew up in the financial industry. His father, Robert L. Johnson, is a Managing Director and Certified Portfolio Manager at Morgan Stanley with over 45 years of experience and recognition in the *Forbes 2024 Best-In-State Wealth Advisors ranking*\*. Throughout Miles' time working with Morgan Stanley Smith Barney, he was personally mentored by his father, learning the business from him as well as from many of the industry's most capable and respected veterans.

His licenses include: Series 7, FINRA Series 66, and Life / Variable Insurance. As a Series 66 registered investment advisor at Morgan Stanley, he has been trained with a focus on economic factors, business information, investment characteristics, client recommendations / strategies, laws, regulations, and guidelines.

On a more personal note, Miles is also a Nationally Registered Emergency Medical Technician (NREMT), avid outdoorsman, overlander, and survivalist. He has trained under numerous internationally recognized professionals and organizations in the outdoor community, including Tom Brown Jr., the world's foremost tracker and survivalist. Over the past 16 years, Miles has worked and volunteered as an outdoor instructor, guide, and lecturer; teaching backpacking, hiking, canyoneering, rock-climbing, kayaking, snowboarding, and many other outdoor related activities.

Miles is located in the Las Vegas, NV branch office located at **8548 Rozita Lee Avenue Suite #400**. He can be reached at **702-242-8372**.

2024 & 2025 Forbes Best-In-State Wealth Management Teams. Source: Forbes.com (Awarded 2024, 2025) Data compiled by SHOOK Research LLC based on the 12-month period concluding in March of the year prior to the issuance of the award. See page 2 for criteria and methodology.

2024 Forbes Best-In-State Wealth Advisors. Source: Forbes.com (Awarded April 2024) Data compiled by SHOOK Research LLC based on the time period from 6/30/22-6/30/23. 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.

## 2025 Forbes Best-In-State Wealth Management Teams

Source: Forbes (Jan 2025) 2025 Forbes Best-In-State Wealth Management Teams ranking awarded in 2025. 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 3/31/23–3/31/24. 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 <a href="http://www.SHOOK/research.com/">http://www.SHOOK/research.com/</a>

## 2024 Forbes Best-In-State Wealth Management Teams

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 <u>www.SHOOKresearch.com</u>.

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

Source: Forbes.com (April 2024) 2024 Forbes America's Top Wealth Advisors and Best-In- State Wealth Advisors 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 6/30/22-6/30/23. 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.

Morgan Stanley Smith Barney LLC. Member SIPC. CRC# 4204662 01/25