



**Robert W. Johnson** is a Financial Advisor with Morgan Stanley in Loveland, CO. He began his financial services career as a Registered Client Service Associate at Morgan Stanley's national branch in Tampa, FL. Frequently exceeding firm goals and expectations, Robert was instrumental as an instructor during the opening of their state-of-the-art facility in Phoenix, AZ.

Later in 2018 he joined *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 received the designation of Financial Planning Specialist while

working in the Las Vegas, NV branch, and has also been a member of the Pacesetters Club from 2021-2024.

As a Graduate of Colorado State University (CSU), Robert earned 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. This was done while pursuing a full-time education, and concurrently working in the restaurant industry as a chef and consultant.

Robert is also an alumnus of Le Cordon Bleu in San Francisco, a world-renowned college of hospitality and culinary arts. Ranking top of his class during his time there, he excelled in all subjects. This education reinforced the importance of a detail oriented and client focused approach.

Growing up around the financial industry, Robert has been mentored by many of its respected veterans including his father Robert L. Johnson, a Managing Director, Financial Advisor, and Certified Portfolio Manager at Morgan Stanley with over 45 years of experience and recognition in the **2024 Forbes Best-In-State Wealth Advisors ranking**\*.

Beyond his role with Morgan Stanley, Robert enjoys giving back to the community. Some activities include volunteering at the Humane Society, participating in 5Ks for awareness, and supporting outdoor conservation. He attended Citizens Police Academy in Colorado and has studied a variety of martial arts. In his free time, he enjoys cooking, gardening, and spending time exploring the outdoors.

Robert is a FINRA Series 66 registered Investment Advisor Representative, as well as a Series 7 Registered Representative with Morgan Stanley in their Loveland, CO Branch located at **6125 Sky Pond Drive, Suite 100**. He can be reached at **970-776-5521**.

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](http://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 <http://www.SHOOKresearch.com/>

#### **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 [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

#### **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](http://www.SHOOKresearch.com).