

2022 Year End Recognition

As we approach year's end, [The Roeser Barbanente Group at Morgan Stanley](#) would like to reflect on the recognitions awarded to our team members in 2022.

These accolades are a testament to our team's continued commitment to our clients and to Morgan Stanley.



Kathy Roeser, ChFC®
Managing Director, Wealth Advisor

- [2022 Forbes Best-in-State Wealth Advisors](#)
- [2022 Forbes Top Women Wealth Advisors](#)
- [2022 Barron's Top 1,200 Financial Advisors](#)
- [2022 Barron's Top 100 Women Financial Advisors](#)
- [2022 Chairman's Club at Morgan Stanley](#)

Forbes Best-In-State Wealth Advisors

Source: Forbes.com (Awarded Apr 2022) Data compiled by SHOOK Research LLC based on time period from 6/30/20 - 6/30/21.

Forbes America's Top Women Wealth Advisors

Source: Forbes.com (Awarded Mar 2021) Data compiled by SHOOK Research LLC based on time period from 9/30/19 - 9/30/20.

Barron's Top 1,200 Financial Advisors: State-by-State

Source: Barron's.com (Awarded Mar 2022) Data compiled by Barron's based on time period from Sept 2020 - Sept 2021.

Barron's Top 100 Women Financial Advisors

Source: Barron's.com (Awarded June 2022) Data compiled by Barron's based on time period from Mar 2021 - Mar 2022. Please refer to important information, disclosures and qualifications at the end of this material.



Roberto Barbanente, CRPC®
Senior Vice President, Financial Advisor,
Family Wealth Director

- [2022 Forbes Best-in-State Wealth Advisors](#)
- [2022 Forbes' Top Next Gen Wealth Advisors](#)
- [2022 Master's Club at Morgan Stanley](#)

Forbes Best-In-State Wealth Advisors

Source: Forbes.com (Awarded Apr 2022) Data compiled by SHOOK Research LLC based on time period from 6/30/20 - 6/30/21.

Forbes America's Top Next-Gen Wealth Advisors & Top Next-Gen Wealth Advisors Best-in-State

Source: Forbes.com (Awarded Aug 2022) Data compiled by SHOOK Research LLC based on time period from 3/31/21 - 3/31/22. Please refer to important information, disclosures and qualifications at the end of this material.

From Our Team



Harris Mandel, CRPC®
Assistant Vice President,
Financial Planning Analyst

Harris Mandel bought his first home this year.



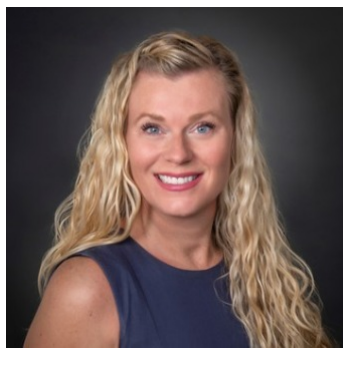
Charlie Manion, CFP®
Assistant Vice President,
Group Director

Charlie Manion completed the Chicago Marathon in October.



Matt Roeser
Wealth Management
Associate

Matt Roeser got married in August. He also broke 70 in Golf.



Andrea Jevne,
Portfolio Associate

Andrea Jevne completed construction on her Backyard Pool.



Peter Mangan
Client Service Associate

Peter Mangan graduated from the University of Dayton and moved to Chicago.



Pictured Above:

[Team Website](#)

¹From left to right: Peter Mangan, Client Service Associate; Andrea Jevne, Portfolio Associate; Roberto Barbanente, CRPC®, Senior Vice President, Financial Advisor, Family Wealth Director; Kathy Roeser, ChFC®, Managing Director, Wealth Advisor; Harris Mandel, CRPC®, Assistant Vice President, Financial Planning Analyst; Charlie Manion, CFP®, Group Director; Matt Roeser, Wealth Management Associate

For more information on the ranking methodology for the award(s) listed, go to <https://www.morganstanley.com/disclosures/awards-disclosure.html> Neither Morgan Stanley nor any of its Financial Advisors paid a fee in exchange for the rating(s).

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Source: Forbes.com (February 2022) 2022 Forbes America's Top Women Wealth Advisors & Forbes Top Women Wealth Advisors Best-In- State rankings awarded in 2022. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 9/30/20 - 9/30/21. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each 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 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 SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

Source: Forbes.com (August 2022) 2022 Forbes America's Top Next-Gen Wealth Advisors and Top Next-Gen Wealth Advisors Best-In-State ranking awarded in 2022. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) during the period from 3/31/21 - 3/31/22. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each 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 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 SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

Source: Barron's.com (March 2022) 2022 Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2022. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2020 - Sept 2021. 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 in-person and telephone due diligence meetings to evaluate each 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 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.

Source: Barron's.com (June 2022) 2022 Barron's Top 100 Women Financial Advisors ranking awarded in 2022. This ranking was determined based on an evaluation process conducted by Barron's during the period from Mar 2021 - Mar 2022. 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 in-person and telephone due diligence meetings to evaluate each 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 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.

Source: Forbes.com (2022). Forbes Best-In- State Wealth Advisors ranking awarded in 2022. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in June of the previous year the award was issued having commenced in June of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each 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 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 SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

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