Morgan Stanley

FOR IMMEDIATE RELEASE

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Sam Sack Named to Forbes Magazine’s List of Top Next-Gen Wealth Advisors Best-in-State

New York City - Morgan Stanley (NYSE: MS) today announced that Sam Sack, a Senior Vice President, Financial Advisor in the Firm’s 5th Avenue Wealth Management office, has been named to Forbes Magazine’s 2022 list of Top Next-Gen Wealth Advisors Best-in-State.

Forbes’ Top Next-Gen Wealth Advisors Best-in-State list comprises a select group of individuals who have a minimum of seven years of industry experience. The ranking, developed by Forbes’ partner SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors and weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews.

“I am pleased that Sam Sack is representing Morgan Stanley,” commented John Palazzetti, Complex Manager of Morgan Stanley’s New York Metro office. “To be named to this list recognizes Sam’s professionalism and dedication to the needs of his valued clients.”

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

Morgan Stanley (NYSE: MS) is a leading global financial services firm providing investment banking, securities, wealth management and investment management services. With offices in more than 41 countries, the Firm’s employees serve clients worldwide including corporations, governments, institutions and individuals. For further information about Morgan Stanley, please visit www.morganstanley.com.

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2022 Forbes Top Next-Gen Wealth Advisors Best-in-State
Source: Forbes.com (August, 2022) Forbes Top Next-Gen Wealth Advisors Best-in-State ranking was developed by SHOOK Research and 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 not indicative of future performance or representative of any one client's experience. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Forbes or SHOOK Research in exchange for the ranking. For more information: www.SHOOKresearch.com.

https://advisor.morganstanley.com/the-sack-group

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