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John LeRose Named to Forbes Magazine's List of Top Next-Gen Wealth Advisors Best-in-State

Milwaukee, WI- Morgan Stanley (NYSE: MS) today announced that John J. LeRose III, a CERTIFIED FINANCIAL PLANNER®, Executive Financial Services Director, and Financial Advisor in the Firm's Milwaukee Wealth Management office, has been named to Forbes Magazine's list of Top Next-Gen Advisors Best-in-State.

The Forbes listing is a select group of individuals who were born in 1981 or later, have a minimum of four years of industry experience and lead, or are viewed as potential leaders of, their teams. The ranking, developed by Forbes' partner SHOOK Research, is based on an algorithm of qualitative and quantitative data, weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews.

"I am pleased that John is representing Morgan Stanley," commented Tim Byrnes, Complex Manager of Morgan Stanley's Wisconsin office. "To be named to this list recognizes John'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 42 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.

Source: Forbes.com. Forbes America's Top Next-Gen Wealth Advisors and Top Next-Gen Wealth Advisors Best-In-State ranking awarded in 2023 and published in Aug 2023. Data compiled by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) from 3/31/22 - 3/31/23. Opinions are SHOOK's who evaluated Advisors on both quantitative and qualitative factors including client retention, industry experience, review of compliance records, firm nominations, assets under management and revenue generated for their firms. Rankings do not reflect any client experience. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Forbes/SHOOK to obtain or use the ranking. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com or ms.com/disclosures/awards-disclosure/.

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