Morgan Stanley

ANDREW SCHULTZ AMONG FINANCIAL ADVISORS ATTENDING BARRON’S TOP ADVISORS SUMMIT

Exclusive Conference Hosts Elite Gathering of Nation’s Pre-eminent Financial Advisors and Industry Decision Makers

Miami Beach, FL, 10/1/2015 – Andrew Schultz, Wealth Advisor, was one of several hundred financial advisors who were selected by their firms to attend the annual Barron’s Top Financial Advisors Summit, hosted by Barron’s magazine to promote best practices in the industry and the value of advice to the investing public. The invitation-only conference was held at the Waldorf-Astoria, September 16-18, in Orlando, FL.

This exclusive conference is designed to promote best practices and generate new ideas across the industry. Participants attended workshops, led by the Top 100 Financial Advisors, that explored issues ranging from business development ideas through managing high-net-worth accounts and family relationships to portfolio management and retirement planning.

Also in attendance were a number of the Top 100 Financial Advisors in the U.S., as ranked and published in Barron’s April 20, 2015 issue. The Top 100 Financial Advisors, comprising advisors from major security firms and independent operations, are chosen based on the volume of assets overseen by the advisors and their teams, revenue generated for their firms and the quality of the advisors’ practices. This annual ranking is the basis for the Top Advisors Summit.

“Financial Advisors who attend this conference are passionate about delivering advice that can help their clients achieve their financial goals. In a challenging economic environment, the dispassionate analysis and well thought-out strategies discussed by some of the industry’s
top professionals made this conference particularly valuable,” said Andrew Schultz.

“Because the Summit brings together key leaders and top decision makers from around the country, it is recognized by the financial advisor community as the industry’s leading event,” said Ed Finn, editor and president of Barron’s. “The ideas and discussions generated here equip attendees to provide the best investment and financial advice to their clients, which is vital given the challenging economic and market conditions of today.”

For more information about Barron’s conferences, please go to www.barrons.com/conferences

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Source: Barron’s “Top 100 Financial Advisors,” April 20, 2015. Barron’s “Top 100 Financial Advisors” bases its ratings on qualitative criteria: professionals with a minimum of 7 years of financial services experience, acceptable compliance records, client retention reports, customer satisfaction, and more. Financial Advisors are quantitatively rated based on varying types of revenues and assets advised by the financial professional, with weightings associated for each. Because individual client portfolio performance varies and is typically unaudited, this rating focuses on customer satisfaction and quality of advice. The rating may not be representative of any one client’s experience because it reflects a sample of all of the experiences of the Financial Advisor’s clients. The rating is not indicative of the Financial Advisor’s past or future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Barron’s in exchange for the rating. Barron’s is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

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