

FEBRUARY 11TH, 2025

Simi Phull Named to Forbes Magazine's "Top Women Wealth Advisors" List

Newport Beach, CA – Morgan Stanley announced today that Simi Phull, a Senior Vice President, Financial Advisor in the Firm's [insert name of office] Wealth Management office, has been named to Forbes Magazine's list of Top Women Wealth Advisors for 2025, listed on forbes.com.

Forbes' "Top Women Wealth Advisors" is 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 Simi Phull is representing Morgan Stanley," commented Lance Million, Market Manager of Morgan Stanley's Newport Beach office. "To be named to this list recognizes Simi's experience, professionalism and dedication to the needs of her 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.

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2025 Forbes America's Top Women Wealth Advisors & Forbes Top Women Wealth Advisors Best-In- State Source: Forbes.com (Awarded February 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 9/30/23-9/30/24. 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, virtual and telephone due diligence meetings to evaluate each Financial Advisor qualitatively, a major component of a ranking algorithm that includes client impact, industry experience, review of best practices and 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. © 2025 Morgan Stanley Smith Barney LLC. Member [SIPC](https://www.sipc.org). CRC# 4204594 02/25

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