Graystone Consulting
from Morgan Stanley

Graystone Consulting | Pittsburgh

Passionate in delivering a complete range of consulting services to institutional clients

QUALIFIED AND EXPERIENCED

- Over $9 Billion in AUM as of December 31st 2023
- Office of 9 investment professionals with an average of 20+ years of industry experience
- Barron's Top Institutional Consultants in 2018-2023
- Forbes Best-In-State Wealth Management Teams 2024
- Our team, combined, has over 200 years of investment industry experience
- 30+ years experience consulting in the Pittsburgh and Cleveland region with a national client base.

(L-R) Nick High, Gretchen Ross, Nick Simakas, Todd Simakas, Greg Simakas, Anthony Smulski, Brian Mackert, Lisa Hohman, Chris Olszewski

We provide clients with exceptional service, while delivering strategies and implementation designed to help meet their objectives. As a thought leader, the team has been at the forefront of supplying investment advice through meticulous manager research, tactical asset allocation and the use of alternative investments.

At Graystone Consulting Pittsburgh, we are able to leverage the strength and global resources of Morgan Stanley while providing unbiased, customized strategies to help our clients meet their fiduciary obligations. Our experience and research efforts allow us to deliver comprehensive services that cover traditional advisory, limited discretion, and OCIO.

We provide strategic advice in areas such as defined benefit plans, defined contribution plans, foundations, non-profit organizations and affluent private clientele.

SENIOR LEADERSHIP

Greg Simakas, CFP®, CIMA®

Executive Director, 36 years industry experience
Institutional Consulting Director
Alternative Investments Director

Todd Simakas, CFP®, CRPS®

Senior Vice President, 24 years industry experience
Institutional Consultant
Alternative Investments Director

Anthony Smulski, CIMA®

Senior Vice President, 21 years industry experience
Institutional Consulting Director
Alternative Investment Director

OUR TEAM

Brian Mackert, CMFC®
Assistant Vice President
Institutional Consulting Analyst
23 years industry experience

Gretchen Ross, CFA
Institutional Consultant
15 years industry experience

Nicholas Simakas, CIMA®, QPFC
Institutional Consultant
12 years industry experience

Nicholas High
Vice President
Institutional Consulting Analyst
21 years industry experience

Lisa Hohman
Portfolio Associate
22 years industry experience

Christopher Olszewski
Senior Registered Associate
24 years industry experience

INSTITUTIONAL SERVICES

- ❑ Customized Investment Policy Statements
- ❑ Asset Allocation Studies
- ❑ Open Architecture Manager Searches, Traditional and Alternative Investments
- ❑ Tactical Recommendations & Strategic Advice
- ❑ Industry Leading Research
- ❑ Portfolio Cost Analysis
- ❑ Ongoing Trustee & Participant Education
- ❑ Performance Measurement and Monitoring
- ❑ Asset-Liability Studies
- ❑ Discretionary Services (OCIO)

OUR CLIENTS INCLUDE

- ❑ Defined Benefit Plans
- ❑ Defined Contribution Plans
- ❑ Taft-Hartley Plans
- ❑ Foundations
- ❑ Endowments
- ❑ Healthcare Entities
- ❑ Public Plans
- ❑ Affluent Private Clientele and Family Offices

Experience shows us our target market is underserved in the quality of investment consulting it receives. We can help. Our knowledgeable team offers customized strategies for the complex problems financial decision makers face. We bring a commitment to serve in our clients' best interest.

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2018-2023 Barron's Top 100 Institutional Consulting Teams (formerly referred to as Barron's Top 50 Institutional Consulting Teams, Barron's Top 50 Institutional Consultants, Barron's Top 30 Institutional Consultants))
Source: Barrons.com (April 2018-2023). Barron's Top 100 Institutional Consulting Teams ranking awarded in 2018-2023. Each ranking was determined based on an evaluation process conducted by Barron's which concluded in December of the previous year the award was issued having commenced in December of the year before that. 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 (Jan 2024) 2024 Forbes Best-In-State Wealth Management Teams ranking awarded in 2024. 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 from 3/31/22–3/31/23. 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 and telephone due diligence meetings to evaluate each Financial 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 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. © 2024 Morgan Stanley Smith Barney LLC. Member SIPC.

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