

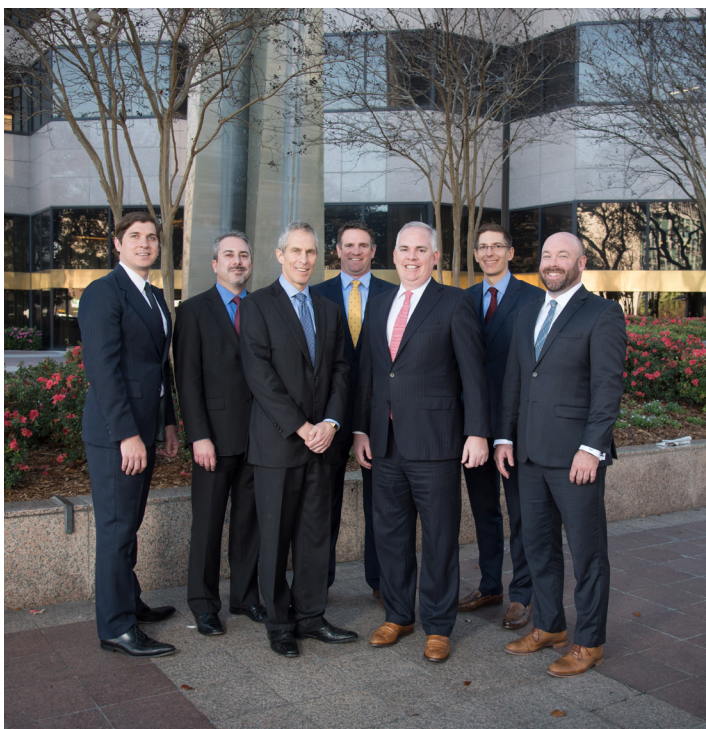
America's Top Wealth Management Teams

High Net Worth

NOVEMBER 8, 2022

2022

2022 RANKING



J.P. Gebbia, Marc Miller, Jim Spiro, Michael Gagliardi, Romi Gonzalez, David Butscher, Emile Louapre

#60 The Spiro Group at Morgan Stanley

Morgan Stanley Wealth Management
New Orleans, Louisiana

Assets Under Management
\$2.6 Billion

James M. Spiro - Managing Director, Financial Advisor
David K. Butscher - Executive Director, Financial Advisor
Romi Gonzalez - Senior Vice President, Financial Advisor
Marc H. Miller - Senior Vice President, Financial Advisor
Michael L. Gagliardi - First Vice President, Financial Advisor
J.P. Gebbia - Portfolio Associate
Emile Louapre - Registered Associate

AS OF MARCH 31, 2022

FORBES AMERICA'S TOP WEALTH MANAGEMENT TEAMS HIGH NET WORTH METHODOLOGY 2022

The Forbes ranking of America's Top Wealth Management Teams, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data. This qualitative criteria focus on studying each team's best practices—service models, investing process, team construct, skill sets, etc. The algorithm also weighs factors like revenue trends, assets under management, compliance records. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

For the full methodology visit:
www.forbes.com/sites/rjshook/2022/11/08/methodology-americas-top-wealth-management-teams-2022

For the full list of Forbes' Top RIA Firms and more visit
www.forbes.com/lists/top-wealth-management-teams-high-net-worth

Investment and Insurance Products: NOT FDIC Insured / NO Bank Guarantee / MAY Lose Value