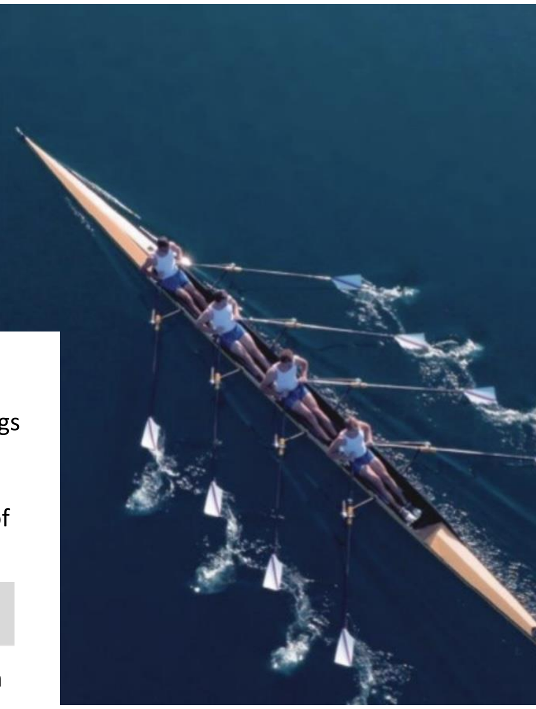
Morgan Stanley

The Wade Street Group at Morgan Stanley

Championships are not won simply because of great players, but by great players executing a well thought out team plan.



It's about what's important to you

Wealth is more than just money. We know that true wealth is about the things you value most deeply. In sports, as in life, there are always challenging transitions. Our approach empowers us to effectively guide you through complex situations, with a focus on fostering trust, confidence, and a sense of financial security. Here's our Big Ten!

Professional Athletes	Life Beyond the Game
1. NIL and first contracts	1. Marriage, divorce, or separation
2. Transition to pro leagues	2. Birth of a child or grandchild
3. Injury, trades and team changes	3. Career changes
4. Retirement from sport	4. Loss of a family member
5. Retirement from life after sport	5. Building your legacy

Your wealth; Our game plan

You expect your financial plan to be comprehensive and incredibly personalized. That's our goal for you. **We link your plan's calculated rate-of-return to your investment solutions, so every investment decision is made with purpose**. We believe this sets us apart. We call it: "Investing in the Clutch."

We developed this discretionary strategy in response to the 2008 financial crisis, and it guides us to this day.

What's the point of benchmarking?

Determining your proper benchmark remains an inexact and unsatisfying dimension of modern wealth management. One of the biggest challenges for an investor is determining how well you are doing. Is the advice you are getting and paying for moving you properly toward your goals and dreams? How do you know? What's the magic benchmark?

We believe there is a superior hybrid approach to three main components:

- Asset Allocation
- Financial Planning & Spendable Life-time Income
- Performance Measurement

What emerges and sets us apart is our fully personalized investment process, designed exclusively with you at the center. Every aspect is driven, shaped, and evaluated based on your plan's specific aims and the returns required to help you reach your goals. This isn't a one-size-fits-all, age-based asset allocation model filled with generic industry jargon and broad indexes. Instead, the benchmark that truly matters is yours. It's personalization at its finest.

With our customized approach, you'll never wonder how you're doing – you'll know. Because your success isn't measured by the market, but by you.

*Sources: Forbes.com (Awarded Jan 2024 & 2025) Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.
Please see additional information at the end of the document.

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2024 & 2025 Forbes Best-In-State Wealth Management Teams*

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2024, 2025 Forbes Best-In- State Wealth Management Teams

Source: Forbes.com (2024, 2025) Forbes Best-In-State Wealth Management Teams ranking awarded in 2024, 2025. Each ranking was based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher). This evaluation process concluded in March of the previous year the award was issued, having commenced in March of the year before that. 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. These rankings are 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.