

The Wood Group at Morgan Stanley

We help successful individuals and families navigating increasingly complex financial lives—bringing clarity to decisions across investments, taxes, and long-term planning.



Who We Serve

Clients come to us when their financial lives become more complex—and decisions carry greater consequence.



Families managing multi-generational wealth



Professionals navigating financial transitions

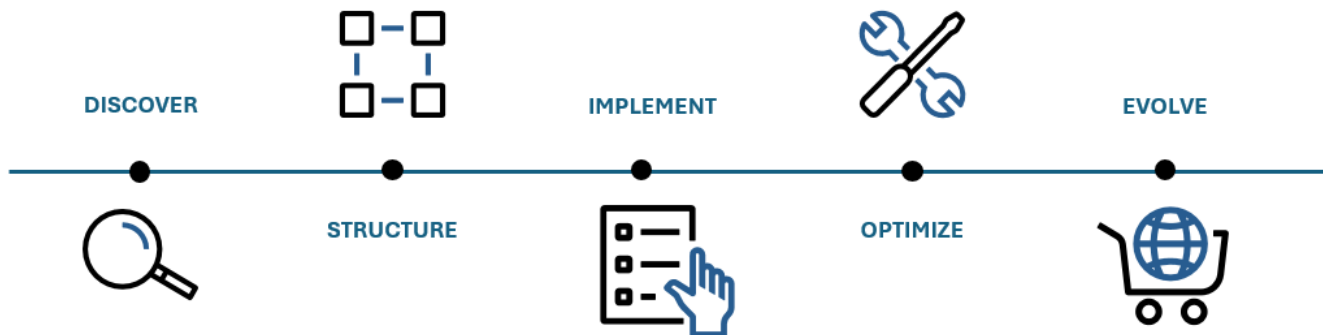


Corporate executives with equity compensation

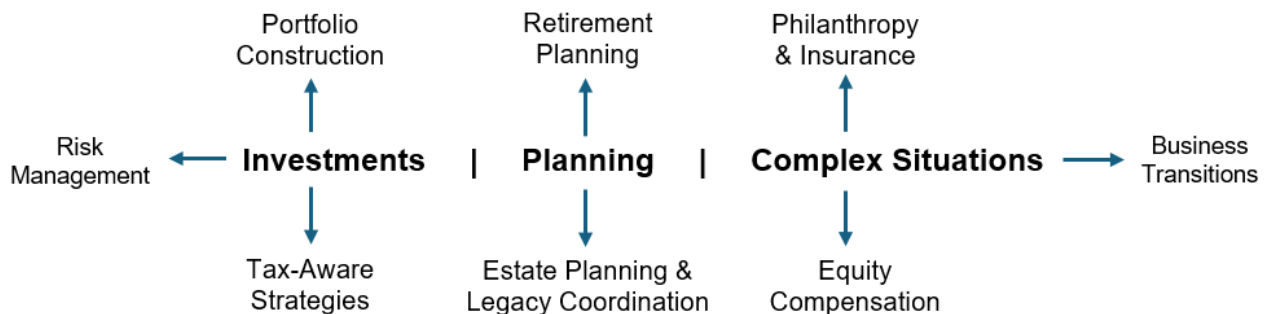


Business owners before and after liquidity events

The Wood Group Approach



What We Help With



Awards and Recognitions



Forbes Best-In-State Wealth Management Teams (2023-2026)



NAPA Top Defined Contribution Advisor Teams (2024-2026)

The Wood Group at Morgan Stanley Team Photo:

(Left to Right): Jay Wood, Financial Advisor, Carolina McGoey, Financial Advisor, Brian Nerreau, Financial Advisor, Nisha Chisena, Financial Advisor, Paul Fitzsimmons, Financial Advisor, Tack Simmons, Financial Advisor, Estefania Munguia, Portfolio Associate, Brenner Anderson, Client Service Associate, Shauna Simpson, Wealth Management Associate

2023-2026 Forbes Best-In-State Wealth Management Teams

Source: [Forbes.com](https://www.forbes.com) (Awarded 2023-2026.) Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.

2024-2026 NAPA's Top DC Advisor Teams

Source: Source: napa-net.org (Awarded 2024-2025) Data compiled by NAPA based on self-reported assets under advisement as of Dec 31 of the year prior to year the award was given. Please refer to important criteria and methodology at the end of this material.

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2023-2026 Forbes Best-In- State Wealth Management Teams

Source: [Forbes.com](https://www.forbes.com) (2023-2026) Forbes Best-In-State Wealth Management Teams ranking awarded in 2023-2026. 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.

2024-2025 NAPA's Top DC Advisor Teams

Source: napa-net.org awarded in 2024-2025. Each ranking was determined based on self-reported assets under advisement as of Dec 31, of the year prior to the year the award was given. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to NAPA to obtain or use the ranking. Nominees must be individual advisor team/offices with a defined contribution book of business, in a single physical location. To be considered, firms had to submit responses to an application form, including information about their practices, notably their defined contribution (DC) assets under advisement. The list is created and conducted by the National Association of Plan Advisors, an affiliate organization of the American Retirement Association, a non-profit association. Ratings are based on the opinion of NAPA and may not be representative of any one client's experience nor indicative of the advisor's future performance.

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