Morgan Stanley

CHERYL LYNN YOUNG ATTENDS BARRON’S TOP WOMEN ADVISORS SUMMIT

Exclusive Conference Hosts Pre-eminient Financial Advisors and Industry Decision Makers

[Los Gatos, CA, December 16, 2015] Cheryl Young, Managing Director, Financial Advisor who was named as one of Barron’s Top 100 Women Financial Advisors in June 2015, was one of several hundred financial advisors who were selected by their firms to attend the tenth annual Barron’s Top Women Advisors Summit, hosted by Barron’s magazine to promote best practices in the industry and the value of advice to the investing public. The invitation-only conference was held at The Breakers in Palm Beach, FL, from December 2 to 4.

This exclusive conference is designed to promote best practices and generate new ideas across the industry. Participants attended workshops, many led by the Top 100 Women Financial Advisors that explored current issues ranging from business development ideas through managing high-net-worth accounts and families to portfolio management and retirement planning.

Also in attendance were many of the Top 100 Women Financial Advisors in the U.S., as ranked and published in Barron’s June 8, 2015, issue. The Top 100 Women Financial Advisors is a select group of individuals who are screened on a number of criteria. Among factors the survey takes into consideration are assets under management, revenue produced for the Firm and quality of service provided to clients. Investment performance is not an explicit criterion. This annual ranking is the basis for the Top Women Advisors Summit.

“Financial Advisors who attend this conference are passionate about delivering advice that
can help their clients achieve their financial goals. In a challenging economic environment, the dispassionate analysis and well thought-out strategies discussed by some of the industry’s top professionals made this conference particularly valuable,” said Cheryl Young.

For more information about Barron’s conferences, please go to www.barrons.com/conferences.

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Source: Barron’s “Top 100 Women Financial Advisors,” June 8, 2015. Barron’s is a registered trademark of Dow Jones & Company, L.P. All rights reserved. Barron’s “Top 100 Women Financial Advisors” bases its ratings on qualitative criteria: professionals with a minimum of 7 years financial services experience, acceptable compliance records, client retention reports, customer satisfaction, and more. Financial Advisors are quantitatively rated based on varying types of revenues and assets advised by the financial professional, with weightings associated for each. Because individual client portfolio performance varies and is typically unaudited, this rating focuses on customer satisfaction and quality of advice. The rating may not be representative of any one client’s experience because it reflects a sample of all of the experiences of the Financial Advisor’s clients. The rating is not indicative of the Financial Advisor’s future performance. Neither Morgan Stanley Smith Barney LLC nor any of its Financial Advisors pay a fee to Barron’s in exchange for the rating.

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