

Morgan Stanley



Barron's 2021 Top 100 Private Wealth Management Teams List

Bermont Carlin Group Adam Carlin Richard Bermont Coral Gables, FL	Kavallieratos Librett Team Nicholas Kavallieratos Michael Librett New York, NY	The Malone Neuhaus Group Francis X. Malone Jon Neuhaus Los Angeles, CA	The Ricca Group Michael Ricca Mary Guza Florham Park, NJ	The MPW Group Scott Magenesen Malcolm Proudfoot Lance Walker Oak Brook, IL	KLT Group James Klein Robert Lord Robert Thomason Los Angeles, CA
Pfeifler Team Brian Pfeifler New York, NY	Team Global Ron Basu Rachael Naylor Christopher Toomey New York, NY	The 650 Team Rich Petit Tim Emanuels Steve Ashley San Francisco, CA	The Connolly Group Richard F. Connolly Ryan Connolly Boston, MA	The BHP Group Fotios Piniros Andrew Hart Roland Breitenecker New York, NY	The Elwaw- Cavalieri Group John Elwaw Matias Cavalieri Miami, FL
545 Group Gregory Vaughan Mark Douglass Jason Bogardus Menlo Park, CA	Vinder Group Ron Vinder New York, NY	The Continuum Group Scott Siegel Steven Rosbush Joseph Carmody Boca Raton, FL	The Magellan Group Richard Zinman Anthony Dertouzos John Moreno New York, NY	Lechner/ Altieri/McMahon John Lechner Nicholas Altieri Terrence McMahon Boston, MA	Goodwin Wall Tung Osio Group Miguel Osio John Goodwin Patrick Wall New York, NY
Gully Schwarz Group Josh Gully P.J. Schwarz Stephen Muecke New York, NY	Team 581 Shane Brisbin Michael Baumer Spencer Larson San Francisco, CA	The Peters Group Kevin Peters Wenton Camporin Jonathan Peters Palm Beach, FL	The I Street Group Brett Anthony H.L. "Trip" McLaughlin III Matthew Offen Washington, DC	The Shadden Group John Shadden Gary Velek Mike Van Dyke Long Beach, CA	The Abacus Group Shawn Rubin Evan Malik Lora Cooperman New York, NY
Polk Wealth Management Lyon Polk Deborah Montaperto New York, NY	Fowler Bull Group Shawn Fowler Maxwell Bull Denver, CO	The Yu Team Gillian Yu Catherine Fang San Francisco, CA	The MGG Group Jim Martin John Griffin Chris Grandieri West Conshohocken, PA	The 173 Group Ned Gibbons Gerard Zell Menlo Park, CA	The Opus Group Grant Lee William Breck Joy Boatwright San Francisco, CA
Capitol Wealth Management Group Marvin McIntyre A.J. Fechter David Gray Donald Metzger Washington, DC	Griep Team Troy Griep Robert Lesko Anthony Jones San Francisco, CA	Atlas Group Scott Wilson Crystal Ho New York, NY	Braun/West/Elwell Group Dean Braun Lowry West Dana Elwell Seattle, WA		

Congratulations to these 34 outstanding Private Wealth Management teams led by the Financial Advisors listed below. You are a bright example of the culture of excellence at our Firm.

Source: Barron's "Top 100 Private Wealth Advisory Teams," April 20, 2021 bases its ratings on qualitative criteria: professionals with a minimum of 7 years of 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 past or future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Barron's in exchange for the rating. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.