



Barron's 2021 Top 100 Institutional Consulting Teams List

Congratulations to these 33 outstanding Graystone Consulting teams led by the Institutional Consulting Directors listed below. You are a bright example of the culture of excellence at our Firm.

**Graystone Consulting,
The Dobbs Group**
Wm. Craig Dobbs
Indianapolis, Ind.

**Graystone Consulting,
Raleigh, Wichita & Dallas**
Lee Morris
William Hendrix
Robert Morris
Raleigh, N.C.
Wichita, Kans.
Dallas, Tex.

**Graystone Consulting,
Stephans Van Liew &
Oiler Group**
Linda Stephans
Kristina Van Liew
Erik Oiler
Chicago, Ill.

**Graystone Consulting,
Houston**
John Granger
Houston, Tex.

**Graystone Consulting,
The Global Institutional
Advisory Solutions**
Jim Detterick
Mark Maizel
Ryan Lewis
New York, N.Y.

**Graystone Consulting,
Metropolitan D.C.**
Robert Scherer
Ross Charkatz
Maureen Shuler
Potomac, Md.

**Graystone Consulting,
The Longo Group**
John Longo
Kenneth Yager
New York, N.Y.

**Graystone Consulting,
Wyomissing, PA**
Harry Herb
Thomas Schatzman
Scott Davis
Wyomissing, Pa.

**Graystone Consulting,
The Zohny Group**
Youssef Zohny
San Francisco, Calif.

**Graystone Consulting,
The Parks Group**
Thomas Parks
Robert Parks
Christina Hom
Milwaukee, Wis.

**Graystone Consulting,
Chicago NW**
George T. Cook
Carl Viard
Mary Tomanek
Barrington, Ill.

**Graystone Consulting,
Tampa**
Adam Palmer
Scott Owens
David Wheeler
Tampa, Fla.

**Graystone Consulting,
The Messner Group**
William Messner
Burton Carlson
John Krakowiak
Birmingham, Mich.

**Graystone Consulting,
Columbus/Grand Rapids**
Michael Rosloniec
Jennifer Hamant
Cheryl Carpenter
Columbus, Ohio
Grand Rapids, Mich.

**Graystone Consulting,
The Boston Seaport Group**
Cliff White
Isabelle Eckel
Boston, Mass.

**Graystone Consulting,
Pittsburgh/Cleveland**
Greg Simakas
Anthony Smulski
Charles Snyder
Sewickley, Pa.

**Graystone Consulting,
Chicago**
James Whitney
Michael Sakach
Mary DiChristofano
Chicago, Ill.

**Graystone Consulting,
The Palo Alto Group**
Tim Skelly
Mark Curtis
Ellie Chizmarova
Palo Alto, Calif.

**Graystone Consulting,
San Antonio**
Ron Kern
Myrteel Ward
Joe Sammons
San Antonio, Tex.

**Graystone Consulting,
Southwest**
James Stoker
Norman Nabhan
Victoria Smith
Houston, Tex.

**Graystone Consulting,
The Fischer Group**
Marc Fischer
Mark Caropreso
Chad Jacob
Rochester, N.Y.

**Graystone Consulting,
The Brice Group**
Timothy Brice
Brian Brice
Birmingham, Mich.

**Graystone Consulting,
San Francisco**
Brian Sharpes
Heidi Richardson
Daniel Tichenor
Walnut Creek, Calif.

**Graystone Consulting,
The Price &
Longhurst Group**
Andrew Price
Karin Longhurst
Los Angeles, Calif.

**Graystone Consulting,
Los Angeles**
Chris Venuti
Marc Roggenkamp
Bryan Mountain
Westlake Village, Calif.

**Graystone Consulting,
Charleston, WV**
John Dawson
Michael D. Hill
Mathew O'Kelly
Charleston, W. Va.

**Graystone Consulting,
Midwest- Oak Brook, IL**
Robert Dow
Brett Herbison
Jim Leckinger
Oak Brook, Ill.

**Graystone Consulting,
The J.K. Meek Group**
James Meek
Russell LaGreca
Allan House
Baltimore, Md.

**Graystone Consulting,
The Chasin Group**
Gerald Chasin
Matthew Chasin
Pamela Chasin
Jericho, N.Y.

**Graystone Consulting,
Chicago/Peoria**
Patrick Donnelly
Thomas McShane
Peoria, Ill.

**Graystone Consulting,
The Atlantic Group**
Samuel Brandwein
Joyce Burich-Andrews
David Isaacson
Boca Raton, Fla.

**Graystone Consulting,
Miami**
Hugo Mantilla
Eric Newman
Daniel Hillis
Miami, Fla.

**Graystone Consulting,
The Robertson Group**
Thomas Robertson
Columbus, Ohio

Source: Barrons.com (April 2021). Barron's Top Institutional Consulting Teams were evaluated on a range of criteria, including institutional investment assets overseen by the team, the revenue generated by those assets, the number of clients served by the team, and the number of team members and their regulatory records. Also considered were the advanced professional designations and accomplishments represented on the team. The rating is not indicative of the Institutional Consulting Director's past or future performance. Neither Morgan Stanley, Smith Barney LLC nor its Institutional Consulting Directors 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.