Barron’s 2017 Top 30 Institutional Consultants List

Congratulations to these 12 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.

Craig Dobbs
Indianapolis, IN

John Longo
New York, NY

Robert S. Scherer
Dean Eisen
Ross Charkatz
Potomac, MD

Charles H. Mulfinger, II
Tampa, FL

Phil C. Shaffer
Jennifer Hamant
Richard Hazzouri
Columbus, OH

Linda Stephens
Kristina Van Liew
Erik Oiler
Chicago, IL

John Granger
Houston, TX

Thomas W. Parks
Milwaukee, WI

George Cook
Carl H. Viard
Barrington, IL

Harry J. Herb
Thomas J. Schatzman
Wyomissing, PA

William J. Sammons
Ronald Kern
Myrteel Ward
San Antonio, TX

Michael Holycross
Birmingham, MI

Source: Barron’s “Ranking the Institutional Consultants,” April 18, 2017. The teams in the ranking 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. © 2017 Investments and services offered through Morgan Stanley Smith Barney LLC. Member SIPC. Graystone Consulting is a business of Morgan Stanley.