

## Graystone Consulting - Charleston, WV has been named as the #1 Forbes 2025 Best-In-State Wealth Management Team

We are honored and proud to announce that Graystone Consulting - Charleston has been named by Forbes as the #1 wealth management team in West Virginia, according to the magazine's list of 2025's Best-In-State Wealth Management Teams.

This accolade is a reflection of our commitment to both you and Morgan Stanley. While much has changed since the firm was founded more than 85 years ago, the quality of service, personal attention and customized strategies we provide to our clients has remained steadfast. Thank you to our valuable clients for your continued support.

It is a privilege to work with you toward the financial future you envision. Thank you for your continued loyalty and confidence.

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**Kelly L Castleberry, CIMA®**

Managing Director,  
Financial Advisor, Family  
Wealth Director, Senior  
Investment Management  
Consultant



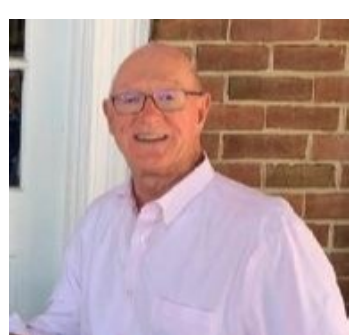
**John E Dawson II**

Managing Director,  
Institutional Consulting  
Director



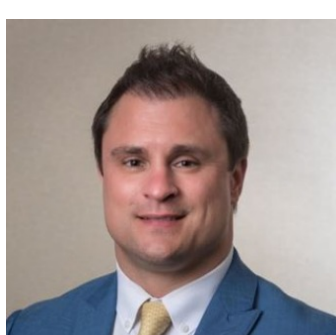
**James Michael Goodwin**

Managing Director,  
Financial Advisor, Portfolio  
Management Director



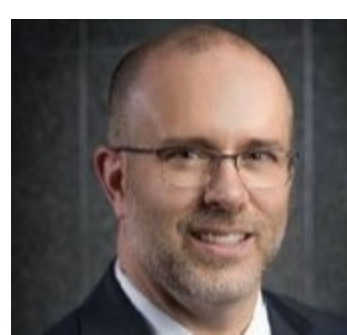
**Frederick H Morgan**

Senior Vice President,  
Financial Advisor,  
Financial Planning  
Specialist



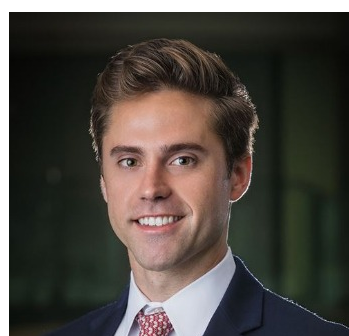
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Senior Vice President,  
Institutional Consultant,  
Corporate Retirement  
Director



**Christopher Heller, CFA, CFP®, CIMA®**

First Vice President, Senior  
Portfolio Manager



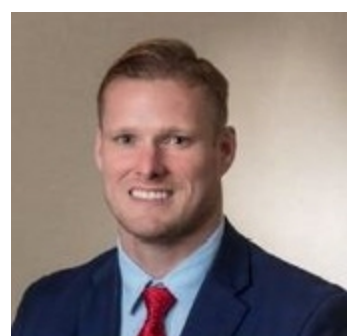
**Austin Goodwin**

Associate Vice President,  
Financial Advisor



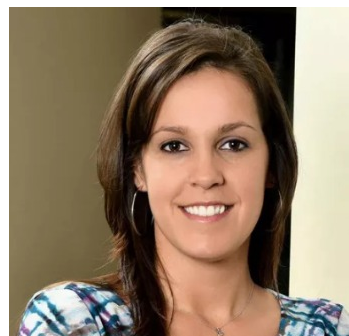
**Katherine Jones**

Senior Vice President,  
Wealth Management,  
Business Development  
Director



**Matthew Kelly, CRPS®**

Vice President,  
Institutional Consulting  
Relationship Manager



**Cassandra Williamson, CFP®**

Assistant Vice President,  
Investment Consultant



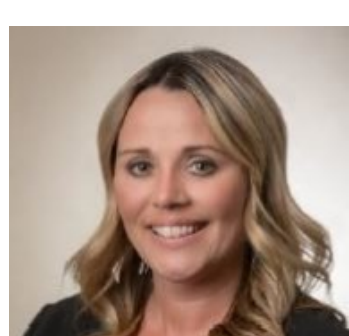
**Brian Anania, CFP®**

Assistant Vice President,  
Investment Consultant,  
Relationship Manager



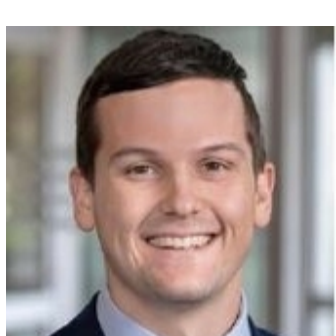
**Melissa Short**

Portfolio Associate



**Deltha Shamblen**

Client Service Associate



**Ryan Mullins, CRPS®**

Wealth Management  
Analyst



**Conner Fowler**

Institutional Consulting  
Analyst

2025 Forbes Best-In-State Wealth Management Teams

Source: Forbes (Awarded Jan 2025). Data compiled by SHOOK Research LLC based for the period 3/31/23-3/31/24.

<https://www.morganstanley.com/what-we-do/wealth-management/forbes-top-wealth-advisors-lists-2025>

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