

# Graystone Consulting

from Morgan Stanley



PLEASE JOIN US

## Graystone Consulting Chicago NW First Quarter 2026 Investment Outlook Webinar

Graystone Chicago NW discusses investment opportunities for the 1<sup>st</sup> quarter of 2026.

### DETAILS

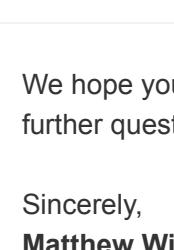
Thursday,  
January 22, 2026  
11:00 a.m. (ET) /  
10:00 a.m. (CT)

Register in advance  
for this webinar:

[Register](#)

\* There will be a replay  
available 5-7 business days  
after the webinar.

### Speakers:



#### George T. Cook

Managing Director Wealth Management, Institutional Consulting Director

George T. Cook is a Managing Director for Graystone Consulting, a division of Morgan Stanley. As an Institutional Consulting Director, George is responsible for strategic policy, portfolio optimization and investment manager selection at Graystone Consulting – Chicago NW.



#### Brad Peterson

Institutional Consultant

Brad Peterson is an Institutional Consultant for Graystone Consulting, a division of Morgan Stanley. He has over 8 years of experience in the financial industry, and his focus includes investment manager research, strategic asset allocation, and investment portfolio development.

To confirm your attendance and receive the related presentation please complete the registration. You will receive a confirmation email with details for joining the webinar. Please note the replay will be available 5-7 business days after the webinar.

We hope you will be able to join us! Reach out to Graystone Chicago NW with any further questions.

Sincerely,

#### Matthew Wilson

Institutional Consulting Analyst

**Graystone Consulting, a business of Morgan Stanley**

760 W. Main Street, Barrington, IL 60010

Ph: 847.382.6608

[graystonechicagonw@morganstanley.com](mailto:graystonechicagonw@morganstanley.com)

Recognized as one of **Barron's** Top Institutional Teams from 2016 – 2025. Barron's Top 100 Institutional Consulting Teams (formerly referred to as Barron's Top 50 Institutional Consulting Teams, Barron's Top 50 Institutional Consultants, Barron's Top 30 Institutional Consultants) Source: Barrons.com (Awarded April 2016-2024). Data compiled by Barron's based on 12-month period concluding in Dec of the year prior to the issuance of the award.

Visit our website: <http://www.msgraystone.com/chicagonw/>

### Important Disclosures

2016-2025 Barron's Top 100 Institutional Consulting Teams (formerly referred to as Barron's Top 50 Institutional Consulting Teams, Barron's Top 50 Institutional Consultants, Barron's Top 30 Institutional Consultants)

Source: Barrons.com (April 2016-2025) Barron's Top 100 Institutional Consulting Teams ranking awarded in 2016-2025. Each ranking was determined based on an evaluation process conducted by Barron's which concluded in December of the previous year the award was issued having commenced in December of the year before that. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

The views expressed are those of the presenter and do not necessarily reflect the views of Morgan Stanley Wealth Management or its affiliates. All opinions are subject to change without notice. Neither the information provided, nor any opinion expressed constitutes a solicitation for the purchase or sale of any security. Past performance is no guarantee of future results.

There will be no discussion of, or distribution of written materials relating to, specific products or investments at this presentation. Individuals should consult with their tax/legal advisors before making any tax/legal-related investment decisions as Morgan Stanley and its Financial Advisors do not provide tax/legal advice.

The strategies and/or investments discussed in this material may not be appropriate for all investors. The circumstances and of a particular investment or strategy will depend on an individual's individual circumstances and objectives.

Attendance at this video conferencing meeting is through invitation by Morgan Stanley Smith Barney LLC (Morgan Stanley) only. If someone outside of Morgan Stanley has forwarded you an invitation, please provide your full name and email address above or excuse yourself from this meeting. If anyone else is present with you, please identify them at the start of the session so that the meeting organizer is aware of everyone in attendance.

Please be advised that any information, content, products, and services discussed during this meeting are intended only for individuals accepted into the meeting and residing in states where the meeting organizer is registered. You may not record, copy, reproduce, print, publish, circulate, or distribute any of the content or materials discussed and/or presented during this meeting without the express written consent of Morgan Stanley.

Please note that any information or content shared by you in this video conference will be visible to all other attendees. For that reason, you should only share information that all attendees are authorized to view.

### Please note that the names of attendees will be visible to all other attendees.

By participating in this video conferencing meeting, you are indicating that you understand, acknowledge, and agree to all of these representations. If you do not agree, please do not proceed further.

Source: Barron's "Top Institutional Consultants," April 20, 2024. 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.

The URL on this e-mail is not indicative of the sender's employer. It is important that you do not use e-mail to request, authorize or effect the purchase or sale of any security or commodity, to send fund transfer instructions, or to affect any other transactions. Any such request, orders, or instructions that you send will not be accepted and will not be processed.

Confidentiality Notice: The information contained in this e-mail and any attachments may be legally privileged and confidential. If you are not an intended recipient, you are hereby notified that any dissemination, distribution, or copying of this e-mail is strictly prohibited. If you have received this e-mail in error, please notify the sender and permanently delete the e-mail and any attachments immediately. You should not retain, copy, or use this e-mail or any attachment for any purpose, nor disclose all or any part of the contents to any other person.

Investments and services offered through Morgan Stanley Smith Barney LLC. Member SIPC. Graystone Consulting is a business of Morgan Stanley.

CRC 5149879 1/26

Investments and services offered through Morgan Stanley Smith Barney LLC. Member SIPC. Graystone Consulting is a business of Morgan Stanley. CRC 5149879 1/26

If you want to unsubscribe from these invitations, DO NOT use the link below. Please email me directly and I will remove you. Thank you [graystonechicagonw@morganstanley.com](mailto:graystonechicagonw@morganstanley.com)