

MARCH 12, 2023

Bob Scherer Named to Barron's "Top 1,200 Financial Advisors"

Washington, D.C., March 12, 2023 – Morgan Stanley announced today that Bob Scherer, a Managing Director, Financial Advisor in the Firm's Potomac, MD, Wealth Management office, has been named to Barron's list of "America's Top 1,200 Advisors: 2023 State-by-State."

The "Barron's Top 1,200 Advisors" is a select group of individuals who are screened on a number of criteria. Among factors the survey takes into consideration are assets under management, revenue produced for the Firm and quality of service provided to clients.

Bob Scherer was ranked #1 in Maryland.

"I am extremely proud that Bob Scherer is representing Morgan Stanley Wealth Management on this list," comment Brandon Wiggins, Branch Manager of Morgan Stanley's Potomac office. "Competition is steep to be selected for this list, and those who make the cut represent a very high level of achievement in serving their clients' wealth management needs."

Graystone Consulting, a business of Morgan Stanley Smith Barney LLC, provides a complete range of investment consulting services to institutional clients, which include corporations, endowments and foundations, health care organizations, insurance entities, state and local governments, Taft-Hartley funds and family offices. Tailored investment advice is delivered by Institutional Consulting Directors, experienced investment professionals who are backed by a dedicated consulting team and the broad resources of Morgan Stanley. For further information, please visit www.morganstanley.com/graystoneconsulting.

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Source: Barron's.com (March 2023) Barron's Top 1,200 Financial Advisors: State-by-State ranking awarded in 2023. This ranking was determined based on an evaluation process conducted by Barron's during the period from Sept 2021 - Sept 2022. 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.

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