

April 14, 2023

Graystone Consulting – Metropolitan Washington D.C. Named to Barron’s Ranking of Top 100 Institutional Consulting Teams

Washington D.C. - Graystone Consulting, a business of Morgan Stanley, announced today that Graystone Consulting – Metropolitan Washington D.C. based in Potomac, Maryland, has been named to Barron’s 2023 list of America’s Top 100 Institutional Consulting Teams.

The list, first published in 2015, identifies the top 100 institutional consulting teams that advise retirement plans, foundations, endowments, corporations, and other institutions on their investment portfolios. The ranking is based on several factors including institutional assets, revenues, number of team members and number of clients served by the team.

“We’re incredibly proud of this well-deserved recognition of Graystone Consulting – Metropolitan Washington D.C.,” said Jeremy France, Head of Graystone Consulting. “Our investment consultants advise a wide range of institutional clients, and this team is truly dedicated to serving their individual fiduciary needs, supporting their unique missions and helping to improve the financial futures of many Americans.”

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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2023 Barron’s Top 100 Institutional Consulting Teams

Source: Barron’s.com. Barron’s Top 100 Institutional Consulting Teams ranking awarded in 2023 and published in April 2023. Data compiled by Barron’s from Dec 2021 - Dec 2022. Opinions are Barron’s, who evaluated Advisors on both quantitative and qualitative factors including client retention, industry experience, review of compliance records, firm nominations, assets under management and revenue generated for their firms. Rankings do not reflect any client experience. 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. For more information, go to ms.com/topadvisors. 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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