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Graystone Consulting – Metropolitan Washington D.C. Named to Forbes Magazine’s Best-In-State Wealth Management 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 Forbes Magazine’s 2024 list of America’s Best-In-State Wealth Management Teams.

Forbes Best-In-State Wealth Management Teams ranking was developed by SHOOK Research and is based on in-person, virtual, and telephone due diligence meetings to measure best practices, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management and revenue generated for their firms.

“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.

2024 Forbes Best-In-State Wealth Management Teams

Source: Forbes.com (Jan 2024) 2024 Forbes Best-In-State Wealth Management Teams ranking awarded in 2024. This ranking was determined based on an evaluation process conducted by SHOOK Research LLC (the research company) in partnership with Forbes (the publisher) for the period from 3/31/22–3/31/23. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC, for placement on its rankings. This ranking is based on in-person and telephone due diligence meetings to evaluate each Financial 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 SHOOK Research LLC and may not be representative of any one client’s experience; investors must carefully choose the right Financial Advisor or team for their own situation and perform their own due diligence. This ranking is not indicative of the Financial Advisor’s future performance. Morgan Stanley Smith Barney LLC is not affiliated with SHOOK Research LLC or Forbes. For more information, see www.SHOOKresearch.com.

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