Morgan Stanley

Graystone Consulting Named a Best Investment Consultant by Crisil Coalition Greenwich for Second Straight Year

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New York —
Graystone Consulting, a business of Morgan Stanley (NYSE: MS), announced today that it has been named a Best Investment Consultant, Service & Investment Counseling – Large Investment Consultants for Institutional Investors in the U.S. by CRISIL Coalition Greenwich for the second consecutive year. CRISIL Coalition Greenwich is a leading global provider of strategic benchmarking, analytics, and insights to the financial services industry.

In addition, from 2022-2024, Graystone received the Greenwich Quality Leader designation in Overall U.S. Investment Consulting among large consultants.*

“This recognition is especially meaningful because it underscores our ability to continue delivering exceptional client service, even as we continue to scale and our institutional assets reach the $1 trillion mark,” said Jeremy France, Head of Institutional Consulting Solutions at Morgan Stanley. “The trust our clients place in us motivates us to deliver thoughtful advice, deep insight, and highly customized service—combining the personal attention of a boutique with the full strength and resources of Morgan Stanley.”

Graystone’s overall score, which is the compilation of investment counselling and service factor scores, was the highest among large consultants in the Coalition Greenwich study and placed Graystone as the sole winner of this award among large consultants. Neither Morgan Stanley Smith Barney LLC nor Graystone Consulting nor its Financial Advisors or Private Wealth Advisors paid a fee to SHOOK Research LLC for placement on its rankings.

Between February and September 2025, Crisil Coalition Greenwich interviewed 698 decision makers at 573 of the largest institutional funds in the United States. These U.S.-based institutional investors include corporate, public, union, endowment and foundation funds among others, with investment pool assets greater than $150 million. 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. Source: Coalition Greenwich Voice of Client – 2025 U.S. Institutional Investors Study

About Graystone Consulting

Graystone Consulting, a business of Morgan Stanley Smith Barney LLC, provides a complete range of investment consulting services to institutional clients, which include corporations, educational institutions, faith-based institutions, endowments and foundations, healthcare organizations, insurance entities, and Taft-Hartley funds. Tailored investment advice is delivered by experienced investment professionals, supported by a dedicated team and the broad resources of Morgan Stanley. To learn more, please visit **www.morganstanley.com/graystone**.

About Morgan Stanley

Morgan Stanley is a leading global financial services firm providing a wide range of investment banking, securities, wealth management and investment management services. With offices in 42 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals. For more information about Morgan Stanley, please visit **www.morganstanley.com**.

About Coalition Greenwich

Coalition Greenwich, a division of CRISIL, an S&P Global Company, is a leading global provider of strategic benchmarking, analytics, and insights to the financial services industry.

*Source: Coalition Greenwich U.S. Institutional Investors Studies (2022, 2023, and 2024; published 2023–2025). The Coalition Greenwich Quality Leader in Overall U.S. Investment Consulting (Large Firms) designation was awarded in each applicable year to three firms and is based on the results of interviews conducted by Coalition Greenwich as part of the respective annual studies. The awards are the product of numerical scores from Coalition Greenwich's proprietary research, generated from study interviews. In addition to interview results, the awards are based on other criteria, including assets under management and industry experience. Investment performance is not a criterion, as client objectives and risk tolerances vary and advisors rarely have audited performance reports. Neither Morgan Stanley Smith Barney LLC nor Graystone Consulting pays a fee to Coalition Greenwich in exchange for these awards, and Graystone does not pay to have its clients participate in the studies. The awards are not indicative of the firms' or their financial advisors' past or future performance and may not be representative of any one client's experience, as the results reflect the average of responding clients' experiences only. Coalition Greenwich is a division of CRISIL. Morgan Stanley is not affiliated with Coalition Greenwich.

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