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The Palo Alto Group's Tim Skelly & Mark T. Curtis Named to Barron's Ranking of Top 100 Institutional Consulting Teams

The Palo Alto Group - Graystone Consulting, a business of Morgan Stanley, announced today that The Palo Alto Group based in Palo Alto and Newport Beach, CA has been named to Barron's 2025 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 The Palo Alto Group 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 <https://graystone.morganstanley.com/graystone-consulting-the-palo-alto-group>

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2025 Barron's Top 100 Institutional Consulting Teams

Source: Barron's (Awarded May 2025). This ranking was determined based on an evaluation process conducted by Barron's for the period Jan 2024-Dec 2024. 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 an 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 assessment 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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