Morgan Stanley

Barron's 2020 Top 50 Private Wealth Management Teams List

Congratulations to these 18 outstanding Private Wealth Management teams led by the Financial Advisors listed below. You are a bright example of the culture of excellence at our Firm.

Bermont Carlin Group
Adam Carlin
Richard Bermont
Coral Gables, FL

Pfeifler Team
Brian Pfeifler
New York, NY

Strachan Group
Brian Strachan
Boston, MA

545 Group
Gregory Vaughan
Mark Douglass
Jason Bogardus
Menlo Park, CA

Hansberger Group
James Hansberger
Morton Levey
Atlanta, GA

Perry Wealth Management
John Perry
Indianapolis, IN

Gully Schwarz Group
Josh Gully
P.J. Schwarz
Stephen Muecke
New York, NY

Polk Wealth Management
Lyon Polk
Deborah Montaperto
New York, NY

Capitol Wealth Management Group
Marvin McIntyre
A.J. Fechter
David Gray
Washington, D.C.

Sawyer Group
Michael Sawyer
New York, NY

Kavallieratos Librett Team
Nicholas Kavallieratos
Michael Librett
New York, NY

Team 566
Richard Petit
Tim Emanuels
Steve Ashley
Menlo Park, CA

Family Wealth Group
Robert Stolar
Adam Merino
Devin Marino
New York, NY

Team Global
Ron Basu
Rachael Naylor
Christopher Toomey
New York, NY

Vinder Group
Ron Vinder
New York, NY

Team 581
Shane Brisbin
Michael Baumer
Spencer Larson
San Francisco, CA

Fowler Bull Group
Shawn Fowler
Maxwell Bull
Denver, CO

Griepp Team
Troy Griepp
Robert Lesko
Richard Palmer
San Francisco, CA

Source: Barron's "Top 50 Private Wealth Advisory Teams," April 20, 2020 bases its ratings on qualitative criteria: professionals with a minimum of 7 years of financial services experience, acceptable compliance records, client retention reports, customer satisfaction, and more. Financial Advisors are quantitatively rated based on varying types of revenues and assets advised by the financial professional, with weightings associated for each. Because individual client portfolio performance varies and is typically unaudited, this rating focuses on customer satisfaction and quality of advice. The rating may not be representative of any one client's experience because it reflects a sample of all of the experiences of the Financial Advisor's clients. The rating is not indicative of the Financial Advisor's past or future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Barron's in exchange for the rating. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

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