Morgan Stanley

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August 22, 2018

Derek McGee and Sid Huguenin Named to Forbes Magazine's List of America's Top Next Generation Wealth Advisors

[FREDERICK]- Morgan Stanley (NYSE: MS) recently announced that **Derek McGee**, a Senior Vice President and Financial Advisor and **Sid Huguenin**, Vice President and Financial Advisor, both partners of The Berkheimer Group in the Firm's Frederick Wealth Management office, have been named to Forbes Magazine's list of America's Top Next Generation Wealth Advisors.

The Forbes listing is a select group of individuals who were born in 1980 or later, have a minimum of four years of industry experience and lead, or are viewed as potential leaders of, their teams. The ranking, developed by Forbes' partner SHOOK Research, is based on an algorithm of qualitative and quantitative data, weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews.

"Derek and Sid are committed to providing comprehensive wealth planning and the highest level of client service," commented Betsy Pakenas, Executive Director, Morgan Stanley and Managing Partner of The Berkheimer Group. "To be named to this list recognizes their dedication and professionalism as they work each day to help our clients reach their goals.

Morgan Stanley Wealth Management, a global leader, provides access to a wide range of products and services to individuals, businesses and institutions, including brokerage and investment advisory services, financial and wealth planning, cash management and lending products and services, annuities and insurance, retirement and trust services.

Morgan Stanley (NYSE: MS) is a leading global financial services firm providing investment banking, securities, wealth management and investment management services. With offices in more than 41 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals. For further information about Morgan Stanley, please visit www.morganstanley.com.

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Source: Forbes Magazine (July, 2018). ***Data provided by [SHOOK™ Research, LLC](http://www.shookresearch.com).*** *Data as of 3/31/18. SHOOK considered Financial Advisors born in 1980 or later with a minimum 4 years relevant experience, who have: built their own practices and lead their teams; joined teams and are viewed as future leadership; or a combination of both. Ranking algorithm is based on qualitative measures: telephone and in-person interviews, 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. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. The rating may not be representative of any one client's experience and is not indicative of the Financial Advisor's future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pays a fee to Forbes or SHOOK Research in exchange for the ranking. For more information see www.SHOOKresearch.com.*

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