
Contact: Branch Manager
Daniel Thompson
215-963-3855

Morgan Stanley

For Immediate Release

STEPHEN TODD WALKER AMONG “BEST OF BEST” FINANCIAL ADVISORS ATTENDING BARRON’S WINNER’S CIRCLE TOP ADVISORS SUMMIT

Exclusive Conference Hosts Wealth Management Leaders and Industry Decision Makers

NEW YORK (Oct. 16, 2008)—Stephen Todd Walker, Senior Vice President, Wealth Advisor, attended the fourth-annual “Top Advisors Summit” hosted by Barron’s Magazine and the Winner’s Circle Organization, founded by R.J. Shook in 2001, which promotes best practices in the industry and the value of advice to the investing public. The invitation-only conference was held at the Boca Raton Resort & Club on Sept. 24-26 in Boca Raton, Fla.

In addition to Stephen Todd Walker were 85 of the Top 100 Financial Advisors in the U.S., as ranked by The Winner’s Circle and published in Barron’s April 21, 2008 issue. These industry leaders conducted workshops and panels that explored current issues in wealth management – from marketing to the affluent, to defining and evolving practices as the market place changes. Small roundtables were also offered and led by the top financial advisors on 12 different topics up for discussion, ranging from facing industry challenges to operating a large retail practice.

“It was an honor to be a part of this event and to meet other professionals who share the same integrity and passion for this industry,” said Mr. Walker. “Discussing best practices one-on-one with the top financial advisors across the country was a unique experience. It will be

beneficial to bring these insights back to my firm and my clients.”

Also in attendance were nearly 500 financial advisors who were selected by their firms to participate in the event. Firms sending attendees included: AIG Advisor Group, Ameriprise Financial, Credit Suisse Securities (USA), LLC, Deutsche Bank, LPL Financial Services, Merrill Lynch, RBC Wealth Management, Morgan Stanley, Robert W. Baird & Co., Smith Barney, UBS Financial Services and Wachovia Securities.

“The Summit has become a benchmark event for the financial advisor community and proved to be an excellent time to hold this conference to generate ideas to help deal with the current market turmoil,” said Edwin Finn, president, Barron’s Magazine. “The top financial advisors came together with other industry leaders to share information and be proactive about finding solutions for their clients and for the industry overall.”

R.J. Shook noted that, “Scores of Winner’s Circle advisors have told me that once they’ve reached the top of their firms, there are fewer people – oftentimes no one – to share ideas with. For this reason, we’re bringing the ‘best of the best’ together to share ideas and help each other and the industry as a whole move to a higher level of performance.”

###

The “Barron’s Winner’s Circle Top 100” is a select group of individuals who are screened on a number of different criteria. Among factors the survey takes into consideration are the overall size and success of practices, the quality of service provided to clients, adherence to high standards of industry regulatory compliance, and leadership in “best practices” of wealth management. Portfolio performance is not a factor.

About Barron’s

Investments and services are offered through Morgan Stanley & Co. Incorporated, member SIPC

Barron's (www.barrons.com) is America's premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron's provides readers with a comprehensive review of the market's recent activity, coupled with in-depth, sophisticated reports on what's likely to happen in the market in the days and weeks to come. As a result, Barron's is the financial information source these powerful people rely on for market information, ideas and insights they can use to increase their professional success and enhance their personal, financial well-being.

About The Winner's Circle ®

Through exhaustive, in-depth studies in the financial services industry, R.J. Shook and his Winner's Circle organization have developed a unique expertise in identifying success patterns and characteristics of the industry's top producers. Since September 2002, he has published a yearly ranking of the top advisors in America. A frequent contributor to business periodicals and the author of numerous books on the subject, Mr. Shook is a recognized authority on best practices in the financial services industry. He frequently gives speeches, conducts workshops and leads panel discussions on topics and issues of concern to financial services professionals and the organizations to which they belong.

www.WCorg.com