



[Draft version - not available publicly]

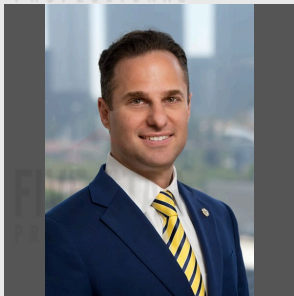
DOWNLOAD PDF FOR COMPLIANCE

LOS ANGELES FIVE STAR AWARD WINNERS

*FEATURED RESULTS

This award was issued on 12/01/2022 by Five Star Professional (FSP) for the time period 03/28/2022 through 09/23/2022. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 3,629 Los Angeles-area wealth managers were considered for the award; 155 (4% of candidates) were named 2023 Five Star Wealth Managers.

Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria - required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria - considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarpromotional.com.



Morgan Stanley

Professional Accomplishments

Five Star Wealth Manager award winner 2013, 2014, 2019, 2020, 2021, 2022, 2023

9665 Wilshire Blvd Ste 600

Beverly Hills, CA 90212

310-285-4935

barak.raviv@morganstanley.com

<https://advisor.morganstanley.com/the-bel-air-group>

LEARN MORE

As seen in



Investment and Insurance Products:

Not FDIC Insured No Bank Guarantee May Lose Value

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

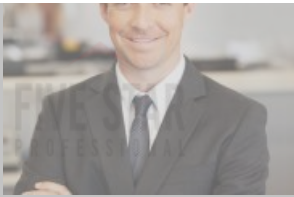
<p>Morgan Stanley Smith Barney LLC, Member SIPC, CRC 5985735
10/23</p>



Brad Phillips

Senior Financial Advisor

9665 Wilshire Blvd Ste 600



Chicago, IL 60130
312-555-2238
brad.phillips@lakeshorefinancial.com
lakeshorefinancial.com/bradphillips



Professional Accomplishments

Five Star Wealth Manager award winner 2014, 2015, 2016, 2017

Dedicated to providing financial solutions to help you achieve your goals

Years Won: 4

[LEARN MORE](#)



Neela Patel

Financial Advisor
OakTree Financial
Chicago, IL
312-555-4555
neela@oaktree.com

Years Won: 4

[LEARN MORE](#)



Geoffrey Danielson

CLU, ChFC
4398013
Platinum Financial
Chicago, IL
206-447-0000
Geoffrey@platinum.com

Years Won: 3

[LEARN MORE](#)



Susan Lerner

Financial Advisor
4398013
Lakeshore Financial
Chicago, IL
206-432-0190
Susan@lakeshorefinancial.com

Years Won: 3

[LEARN MORE](#)



Antonio Wilson

CFP
4398013
Diamond Financial
Chicago, IL
206-984-3256
antonio@diamondfinancial.com

Years Won: 7

[LEARN MORE](#)

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

*Five Star winners do not pay to win or to be considered for the award. Professionals showing up in Featured Results, however, may have paid a fee to appear there.

© 2025 - Five Star Professional

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE STAR
PROFESSIONAL

FIVE ST
PROFESSIO