



Barron's 2021 Top 100 Institutional Consulting Teams List

Congratulations to these 33 outstanding Graystone Consulting teams led by the Institutional Consulting Directors listed below. You are a bright example of the culture of excellence at our Firm.

Graystone Consulting, The Dobbs Group
Wm. Craig Dobbs
Indianapolis, Ind.

Graystone Consulting, Raleigh, Wichita & Dallas
Lee Morris
William Hendrix
Robert Morris
Raleigh, N.C.
Wichita, Kans.
Dallas, Tex.

Graystone Consulting, Stephans Van Liew & Oiler Group
Linda Stephans
Kristina Van Liew
Erik Oiler
Chicago, Ill.

Graystone Consulting, Houston
John Granger
Houston, Tex.

Graystone Consulting, The Global Institutional Advisory Solutions
Jim Detterick
Mark Maizel
Ryan Lewis
New York, N.Y.

Graystone Consulting, Metropolitan D.C.
Robert Scherer
Ross Charkatz
Maureen Shuler
Potomac, Md.

Graystone Consulting, The Longo Group
John Longo
Kenneth Yager
New York, N.Y.

Graystone Consulting, Wyomissing, PA
Harry Herb
Thomas Schatzman
Scott Davis
Wyomissing, Pa.

Graystone Consulting, The Zohny Group
Youssef Zohny
San Francisco, Calif.

Graystone Consulting, The Parks Group
Thomas Parks
Robert Parks
Christina Hom
Milwaukee, Wis.

Graystone Consulting, Chicago NW
George T. Cook
Carl Viard
Mary Tomanek
Barrington, Ill.

Graystone Consulting, Tampa
Adam Palmer
Scott Owens
David Wheeler
Tampa, Fla.

Graystone Consulting, The Messner Group
William Messner
Burton Carlson
John Krakowiak
Birmingham, Mich.

Graystone Consulting, Columbus/Grand Rapids
Michael Rosloniec
Jennifer Hamant
Cheryl Carpenter
Columbus, Ohio
Grand Rapids, Mich.

Graystone Consulting, The Boston Seaport Group
Cliff White
Isabelle Eckel
Boston, Mass.

Graystone Consulting, Pittsburgh/Cleveland
Greg Simakas
Anthony Smulski
Charles Snyder
Sewickley, Pa.

Graystone Consulting, Chicago
James Whitney
Michael Sakach
Mary DiChristofano
Chicago, Ill.

Graystone Consulting, The Palo Alto Group
Tim Skelly
Mark Curtis
Ellie Chizmarova
Palo Alto, Calif.

Graystone Consulting, San Antonio
Ron Kern
Myrteel Ward
Joe Sammons
San Antonio, Tex.

Graystone Consulting, Southwest
James Stoker
Norman Nabhan
Victoria Smith
Houston, Tex.

Graystone Consulting, The Fischer Group
Marc Fischer
Mark Caropreso
Chad Jacob
Rochester, N.Y.

Graystone Consulting, The Brice Group
Timothy Brice
Brian Brice
Birmingham, Mich.

Graystone Consulting, San Francisco
Brian Sharpes
Heidi Richardson
Daniel Tichenor
Walnut Creek, Calif.

Graystone Consulting, The Price & Longhurst Group
Andrew Price
Karin Longhurst
Los Angeles, Calif.

Graystone Consulting, Los Angeles
Chris Venuti
Marc Roggenkamp
Bryan Mountain
Westlake Village, Calif.

Graystone Consulting, Charleston, WV
John Dawson
Michael D. Hill
Mathew O'Kelly
Charleston, W. Va.

Graystone Consulting, Midwest - Oak Brook, IL
Robert Dow
Brett Herbison
Jim Leckinger
Oak Brook, Ill.

Graystone Consulting, The J.K. Meek Group
James Meek
Russell LaGreca
Allan House
Baltimore, Md.

Graystone Consulting, The Chasin Group
Gerald Chasin
Matthew Chasin
Pamela Chasin
Jericho, N.Y.

Graystone Consulting, Chicago/Peoria
Patrick Donnelly
Thomas McShane
Peoria, Ill.

Graystone Consulting, The Atlantic Group
Samuel Brandwein
Joyce Burich-Andrews
David Isaacson
Boca Raton, Fla.

Graystone Consulting, Miami
Hugo Mantilla
Eric Newman
Daniel Hillis
Miami, Fla.

Graystone Consulting, The Robertson Group
Thomas Robertson
Columbus, Ohio

Source: Barrons.com (April 2021). Barron's Top Institutional Consulting Teams were evaluated on a range of criteria, including institutional investment assets overseen by the team, the revenue generated by those assets, the number of clients served by the team, and the number of team members and their regulatory records. Also considered were the advanced professional designations and accomplishments represented on the team. The rating is not indicative of the Institutional Consulting Director's past or future performance. Neither Morgan Stanley, Smith Barney LLC nor its Institutional Consulting Directors 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.