



Mark T. Curtis

Managing Director, Stock Plan Director
Institutional Consulting Director-Graystone

Mark Curtis is a Managing Director - Graystone Consulting, a division of Morgan Stanley (and its predecessor firms). His advisory business includes affluent investors, foundations, endowments, and corporate services for public and private companies.

Mark has been ranked by leading industry magazines, Barron's magazine, and Forbes. The most recent 2025 "Barron's—Top 100 Financial Advisors Rankings" recognized him as the #2 advisor in America. Also, "Forbes Best-In-State Wealth Advisors" (2025) ranked #1 in Northern California and "Forbes America's Top Wealth Advisors" (2025) ranked #5.

Mark sits on the advisory boards of Riverwood Capital and previously, he served as co-chairman of Morgan Stanley's Director Advisory Group and as president of the Association of Professional Investment Consultants (APIC). He is a graduate of Stanford University with an MBA from UCLA.

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Award Disclosures

2025 Barron's Top 100 Financial Advisors

Source: Barron's.com (Awarded Apr 2025) Data compiled by Barron's based on time period from Dec 2023 - Dec 2024.

2025 Barron's Top 100 Financial Advisors awarded in 2025. This ranking was determined based on an evaluation process conducted by Barron's during the period from Dec 2020 - Dec 2021. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors paid a fee to Barron's to obtain or use the ranking. This ranking is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion. Rankings are based on the opinions of Barron's and this ranking may not be representative of any one client's experience. This ranking is not indicative of the Financial Advisor's future performance. Morgan Stanley Smith Barney LLC is not affiliated with Barron's. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

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2025 Forbes Best-In-State Wealth Advisors and America's Top Wealth Advisors

Source: 2025 Forbes "America's Top Wealth Advisors" list. Opinions provided by SHOOK® Research, LLC and is based on in-person, virtual and telephone due-diligence meetings that measure best practices, client retention, industry experience, credentials, compliance records, firm nominations, assets under management and Firm-generated revenue (investment performance is not a criterion). SHOOK's rankings are available for client evaluation only, are not indicative of future performance and do not represent any one client's experience and available for investor help in evaluating the right financial advisor. Compensation was not received from anyone for the study. Past performance does not guarantee future results. Details available at the SHOOK Research website. SHOOK is a registered trademark of SHOOK Research, LLC.