



Kathy Entwistle '87 '15P '17P
Managing Director, Private Wealth Advisor
Morgan Stanley

Kathy Entwistle, Managing Director, Private Wealth Advisor at Morgan Stanley, provides straightforward financial advice—tailored to the life you lead. Kathy has been in the financial services industry for more than 25 years. A former stay at home mom who donated her time teaching local financial classes to women, she rose to the heights of being named a “Forbes America’s Top Women Wealth Advisor” for 2017, 2018, 2019 and 2020. As a seasoned multigenerational practice within Morgan Stanley Private Wealth Management, Kathy, along with her son, and the rest of her team, have guided generations of sophisticated families as well as senior executives and entrepreneurs through complex financial challenges. She is a champion not only for women, but for millennials seeking clarity.

Source: Forbes.com (April, 2020). Top Women Wealth Advisors ranking was developed by SHOOK Research and 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 because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client’s experience. Neither Forbes nor SHOOK receives compensation from any party, including Morgan Stanley Smith Barney LLC, nor its Financial Advisors or Private Wealth Advisors in exchange for the ranking. For more information: www.SHOOKresearch.com

Morgan Stanley Private Wealth Management is a division of Morgan Stanley Smith Barney LLC. Member SIPC.