

**CURRENT ISSUE**



**PAST ISSUES**

**RIA Survey 2012**  
[Click Here](#)

**Innovative Alternative Strategies Conference Agenda 2012**  
[Click Here](#)

**ADVISOR SERVICES**

- Broker-Dealers
- Custodian/Fee-Only
- Technology

**ADVICE**

- 401(k) plans
- Annuities
- Business Transitions
- Compliance/Fraud
- Economy
- Education/529
- Estate Planning
- Insurance
- Practice Management
- Retirement Planning
- Retirement Income
- Social Media
- Tax Planning
- Women in Planning

Sponsored by:



**FA NEWS**

September 06, 2012

**MORGAN STANLEY AIMS FOR SMALL BUSINESS CLIENTS**

Morgan Stanley Smith Barney aims to increase the number of its small-business wealth management clients through an exclusive referral agreement it announced today.

MSSB announced the alliance with Phoenix-based B2B CFO, the largest CFO services firm in the United States which advises more than 800 clients. B2B CFO serves owners of privately held companies with revenues up to \$75 million that want to increase cash, profitability, sales and company value.

The relationship, formalized through MSSB's Professional Alliance Group, allows B2B CFO to refer clients to Morgan Stanley Smith Barney. "This is an important professional alliance for Morgan Stanley Smith Barney," said Michael Brunner, senior vice president and financial advisor in MSSB's downtown Houston office. "This concept has the potential to provide a paradigm shift in the way privately held business owners manage their finances. Instead of the traditional 'siloed' approach that involves multiple advisors, business owners now have the ability to apply a comprehensive strategy to help reach their financial goals for both their family and business."

**Comments**

Please login to write comments.

[Login](#) | [Logout](#)



**Aberdeen International Equity Fund (GIGAX)**



[Click Here](#)

 [SHARE THIS](#)  
[PRINT](#)

**FINANCIAL ADVISOR BLOGS**



[Evan Simonoff's Blog](#)



[Dorothy Hinchcliff's Green Blog](#)



[Charlie Stroller's Blog](#)

[View All Our Blogs](#)

**RELATED ARTICLES**

[Barclays Hires Ex-Jet Chrebet's Team From Morgan Stanley](#)

[Mesirow Financial Hires Two Industry Veterans](#)

[JHS Capital Advisors Continues Expansion](#)

[Merrill Lynch Teams Create New Independent Firm](#)

[Morgan Stanley Smith Barney Group Threatens Exodus, Demands Payments](#)

**EXPERT VIEWS**

**What's Your 'Webutation'?**

Sometimes it is better to hear what is and is not working directly from the guys on the front lines, especially when it comes to social media and other technology.

[Read more...](#)

**Danger Ahead: The Real Problem With Today's Income**

**QUICK POLL**

Will the rally in gold continue?

- Yes
- No

 



PRUDENTIAL INVESTMENTS  
 >> MUTUAL FUNDS

**PRUDENTIAL JENNISON EQUITY INCOME FUND**

TAP THE INCOME POTENTIAL OF STOCKS



Download white paper 

[View important information](#)

0212708-00001-00