Shuron A. Morton

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Morgan Stanley Wealth Management **Columbia, MD**
Financial Advisor **August 2013 – Present**

- Offer financial advice to high net worth individuals ($1mm+ investable assets) to allow for the most efficient ways to accumulate, preserve, and pass wealth to future generations
- Work with a team of professionals focused on the asset management, risk management, and trust service needs of individuals and businesses
- Assist Business Owners by advising on daily money management, cash reserve, and long term financial planning strategies
- Act as general concierge for all clients
- Currently in top tier of production for peer group

PNC Bank N.A **Baltimore, MD**
Vice President and Financial Advisor **June 2009 – August 2013**

- Manager of the PNC's largest Retail Bank Branch in Maryland by deposit size
- Hired, trained, and developed a staff of 11 of which 80% were promoted during their time with me
- Offered Banking and Investment services to retail banking clients
- Became a brand ambassador via networking, outreach, and community events

Wachovia **December 2001-May 2009**
Relationship Manager, Baltimore, MD (January 2007 – May 2009)
Wachovia Wealth Management

- Responsible for maintaining, retaining, and growing a $52mm book of business consisting of affluent clients by using advisory and consultative sales skills
- Grow client and bank revenue through a comprehensive understanding of clients' financial objectives by delivering holistic solutions through team specialists
- Proactively seek business through referrals from existing client relationships, internal partnerships and external networking opportunities

Financial Sales Leader, Greenville, SC (January 2006-January 2007)

- Motivate, coach, and develop Financial Sales Specialists to increase market share, increase customer wallet share, and enhance customer profitability, while simultaneously ensuring the delivery of exceptional customer service
- Able to increase market share in deposits, loans and investments for Wachovia in the Greenville market
- Conduct joint Small Business, Retail, and Investment appointments with Financial Specialists to demonstrate sales processes and ensure success
- Recruit, hire, and develop new talent

Sr. Financial Specialist, Columbia, MD (December 2001-January 2006)

- Provide portfolio management and asset allocation strategies to existing bank customers while strengthening the banks book of business
- Offer debt consolidation and credit enhancing strategies to customers via mortgage, home equity, personal, and auto loans
- Offer retail banking and Small Business products and services to potential customers and Business owners through seminars, networking, and telemarketing
- Mentor newly hired Financial Specialists in company policy and procedure and monitor progress to help succeed

American Express Financial Advisors **New York, NY**
Financial Advisor/ Advisor Coach **December 1999- December 2001**

- Manager of Early Career Advisors; responsible for their professional and client development including, but not limited to: developing and overseeing lead generation, client acquisition, case analysis, and asset allocation
- Maintained own financial planning practice by managing the assets of high net worth individuals and small business owners through individual stocks, mutual funds, wrap accounts, annuities, and insurance products
- Analyze client accounts to evaluate and address financial needs and concerns in the areas of financial positioning, asset management, income tax planning, accumulation of wealth, retirement, and estate planning

Sands Brothers & Co. LTD. **New York, NY**
Retail Stock Broker **August 1998- December 1999**

- Solicited retail brokerage accounts with starting balances of $50,000
- Assisted in the management of $18,000,000 portfolio by maintaining investment relationships with high net worth individuals

Education

Union College, Schenectady, NY
Bachelor of Science, Psychology 1998

Licenses

- FINRA Series 7 and 66
- Maryland Life and Health Insurance License

Affiliations

Alpha Phi Alpha Fraternity Inc.
USA and AAU Track and Field Coach
Network Referral Group (NRG)