

suburban life



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pg. 40



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Well Positioned

Even in challenging economic times, the investment advisory firm led by **J. Robert Morris** helps small-business owners, retirees, and other investors achieve their long-term goals.

by **JILL LUPINE** | photography by **JODY ROBINSON**

Every elite tennis player understands the importance of a good return. He or she is also in tune with the ebb and flow of a hard-fought match, able to spot opportunities to gain an advantage without taking undue risk. The same skills that apply to tennis also apply to the world of investing, and J. Robert Morris knows a thing or two about both.

Morris was a burgeoning tennis star during his college years at Temple University before joining the U.S. Marines. In 1967 and '68, he was in Vietnam fighting for the United States and its allies, earning two Purple Hearts and the Navy Commendation with Combat "V" award along the way. Having survived the infamous Tet Offensive, he spent his last four months in the service playing tennis for the Marines. He wound up winning the All-Marine Tournament at Camp Lejeune, and then went on to represent his branch in the All-Service Championships in San Diego, California, before leaving the military.

After returning to the East Coast, Morris found his footing in the investments and insurance business—and he never looked back. Morris has been working as an independent financial planner for more than 40 years, helping self-employed business owners, retirees, baby boomers, and other investors work toward their financial goals.

"We're in the business of helping clients preserve their assets and find ways to make a competitive return, which has become very difficult," says Morris, whose investment firm is based in Haverford. "The economy has seen tremendous growth these past several years, but we have seen a lot of change of late, and not necessarily for the better. ... [Persistent inflation] gives you an idea of how rough things are now, and the next few years could also be challenging."

The Morris Financial Group utilizes Kestra Financial, an investment brokerage firm, otherwise known as a broker/dealer, and The Kestra Investment Advisory platform. Kestra Financial is one of the nation's largest networks of independent advisors. The organization's customer-driven approach is focused on meeting the unique demands of every client. Having the expertise and resources of Kestra Financial has been essential, according to Morris. Kestra brings leadership, knowledge, and proprietary software, as well as a certain of steadiness to the investment business. The organization takes a systematic approach that Morris feels is "very useful to our clients."

"My son, Townsend, has been with me for almost 20 years," he adds. "Townsend has brought a perspective to our firm that

was not entirely unexpected. Technical expertise, as well as the many ways of communicating with our clients, has become of the utmost importance. Townsend has focused or directed our business into the advisory of assets sector of the market. What has not changed, but has improved, is the need of creating investment allocations for our clients based on their risk tolerance and time horizon, all of which enables our clients to fulfill their financial objectives."

The firm has a mix of clients, including the self-employed, retirees, and corporate executives, among others. Morris suggests clients need a certain amount of assets to effectively take advantage of all the firm's services.

"When working with business owners," he adds, "it often boils down to personal financial planning, because when you get into a small business, it's the owners of the business and the executives of the business that use us the most, and benefit the most from our expertise in terms of the investment products and tax relief. When an executive or a business owner decides to retire, their sounding boards are often left behind. This has become increasingly important as we become their go-to group to assist with all retirement questions."

In addition to helping clients achieve



W. Townsend Morris

their financial goals, Morris continues to use his spare time to help the Delaware Valley chapter of the Juvenile Diabetes Research Foundation, of which he is a board member. His family is passionate about doing its part to combat “a hellacious disease,” in part because his youngest son, Stockton Morris, has Type I diabetes.

“My wife and I maintain our relationship with JDRF by acting as co-chairs of a tennis event called ‘Ace for a Cure,’ he adds. “We gather approximately 70 to 80 tennis players from all the surrounding area, on



J. Robert Morris

the grass at [a venerable local sporting club] for a round-robin event that includes a sit-down luncheon, a raffle, and a silent auction. All proceeds go to the JDRF.”

Although he does not solicit business of any kind through the JDRF, Morris has met some new clients through this shared affiliation. Regardless of how a client and Morris’ firm find one another, their interaction begins with a discovery process.

“When we’re formulating an agenda for a client meeting, it’s sometimes a matter of letting the client open up and talk about



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THE MORRIS FINANCIAL GROUP

themselves, what their objectives are and what’s been accomplished to date,” he adds. “Townsend and I try to fill in the gaps from an investment need, and from an asset-management need. We then monitor the assets for which we charge a fee. Sometimes it might be a matter of other exposures—life, health, and disability. Suggestions will then be made to address those needs.”

Going forward, Morris suggests the association with Kestra Financial has kept his firm well positioned to help clients meet their goals—even amid economic times some might describe as challenging, if not tumultuous. ■



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