MWA

asking questions, finding solutions

ABOUT US

Morton Wealth Advisors (MWA) is an SEC registered investment advisor (RIA) firm providing independent, conflict-free consulting services. Our services are designed to meet each client's specific needs in the investment management process.

Our business is focused on serving individual households, trusts, endowments, pension plans and small businesses. We provide our clients with a precise investment plan, a hands-on advisory partnership, and administrative support as required. We recognize the unique challenges clients face in managing their assets, including the impact of taxes, inflation, income needs, educational needs and risk tolerances. We also work closely with our clients legal and tax advisors to address the clients needs. If a client does not have suitable advisors in these areas, we can refer them to professionals with whom we have long standing relationships, as well as research others that best fit their needs.

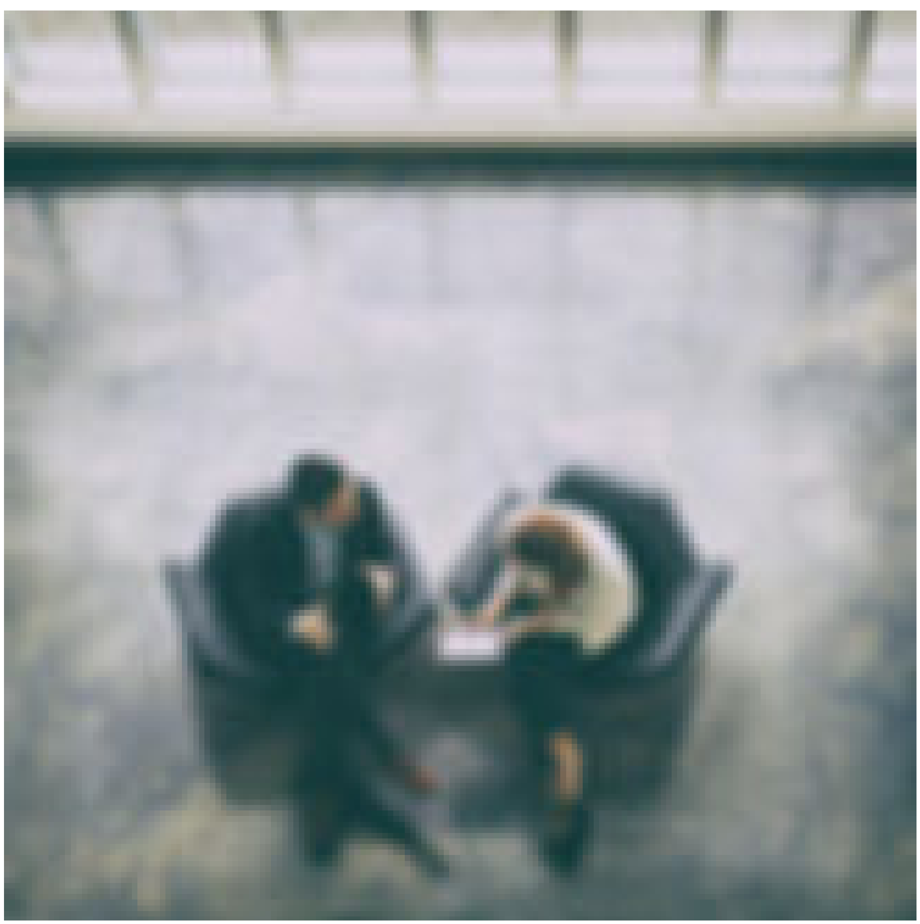
We view strong and personal relationships with our clients as not only our fiduciary responsibility, but a key to our success.

Investment Philosophy

Our investment philosophy revolves around building portfolios of individual equities and fixed income securities. Doing so allows us greater control and flexibility around portfolio construction while controlling capital gains. Shying away from investment vehicles like mutual funds and annuities eliminates embedded fees and costs which over time can deteriorate portfolio performance.

We believe every client and their situation is unique, therefore no client should be placed in a "model" portfolio. We cater to each investor's need, whether it is maximizing income to meet current retirement lifestyle or investing for longer term growth, our portfolios are customized for you.

Overall, our philosophy allows for a custom portfolio for each client and a more sophisticated approach.



ADVISORS

Michael J. Capobianco

Michael has worked primarily with closely held businesses, endowments and high net worth individuals. Michael began his career with Smith Barney in Boston and also served as Managing Director at Legg Mason Wood Walker and Wachovia Securities. Michael graduated from Boston University with a B.A. in Economics.

Randall J. Tavilla

Randall focuses on the firms portfolio management, while continually researching businesses for opportunities in the equity and fixed income markets. Randall has experience creating and implementing strategic financial plans for retirement and non-retirement assets. He also has implemented insurance strategies for businesses, individuals and trusts. Randall graduated cum laude from Salem State University with a B.S degree in Business.

Michael and **Randall** have a combined for over 39 years in the industry, partnering in 2008 to combine and leverage their unique skill set. Our belief is our clients benefit by incorporating Michael and Randall's skills to manage each portfolio in a team approach. Our strength is our commitment to servicing our clients and help navigate them through the ever volatile markets while keeping their objectives and goals in focus.

CONTACT US

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Ask us a question! Click on the "Let's Chat" and send us a note. Be sure to add your contact info so we can reply

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