



**Your financial goals are *personal*.**

**Your *journey* to success should be too.**

As an independent, fee-only financial planning firm we are dedicated to providing personal, steadfast advocacy and academically-proven strategies to help you create a path towards achieving your financial goals.

***Get started on your journey*** ➔



## **Your Personal Guide.**

We tailor our wealth management plans to fit your specific needs. From achieving financial independence to protecting your legacy, our plans go beyond investments to give you a holistic map towards success.

**Tell Me More (<https://mfcplanners.com/advantage/>)**





**It's Time to Embark.**

*Name*

*Email*

*Phone*



**SUBMIT**






## **Welcome to Morris Financial Concepts.**

We are an inquisitive and solution-oriented team of professionals. We share an unyielding passion to support and inspire you to obtain your goals.

**MEET THE TEAM (<https://mfcplanners.com/about/certified-financial-planners/>)**

# Our Services

A photograph of a white sailboat on the water during sunset. The sky is a warm, golden yellow, and the water is dark blue with some whitecaps. A person is visible on the deck of the boat, and the mast and rigging are prominent.

## Financial Planning

Using a holistic approach to understand your unique financial situation, we can help you identify specific goals and set a path towards achieving success.


[Learn More](#) →

## Tax Strategy

Using tools like investment selection, real estate analysis, debt management and college savings vehicles, our tax professionals can provide strategies to help optimize resources.

[Learn More](#) →



A photograph of a couple on a white sailboat on the ocean at sunset. The sun is low on the horizon, creating a warm, golden glow over the water and the sky. The sailboat's mast and rigging are visible against the bright sky. The couple is sitting on the deck, looking towards the horizon.

## Retirement Planning

Preparing for the future starts today. We can help you put everything in place now, so there is no need to worry about tomorrow.

[Learn More](#) ➔

## Legacy Planning

Working with a CERTIFIED FINANCIAL PLANNER™ can help you have peace of mind that your hard earned estate passes on the way you want.

[Learn More](#) ➔

## **Giving Back**

Being good stewards of your wealth can incorporate giving back. Whether you're gifting education or fulfilling charitable desires, we can provide guidance and direction.

**Learn More** 

**Learn how to get started on your journey to financial freedom.**

**LET'S GO ([HTTPS://MFCPLANNERS.COM/CONTACT/](https://mfcplanners.com/contact/))**

**IN THE KNOW**



800 x 650

## Saving for your Children or Grandchildren's Education

With tuition prices continuously on the rise, saving for your children's or grandchildren's education can seem like an insurmountable...

~~RITABLE-DISTRIBUTIONS-QCDS-AND-HOW-THEY-WORK/~~



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**READ M**

**READ MORE ([HTTPS://MFCPLANNERS.COM/SAVING-FOR-YOUR-CHILDREN-OR-GRANDCHIL](https://MFCPLANNERS.COM/SAVING-FOR-YOUR-CHILDREN-OR-GRANDCHIL))**

*CFP® certification is a voluntary certification granted in the United States by Certified Financial Planner Board of Standards, Inc. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Individuals who become certified are required to complete continuing education.*

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