



DERSE | MORGEN

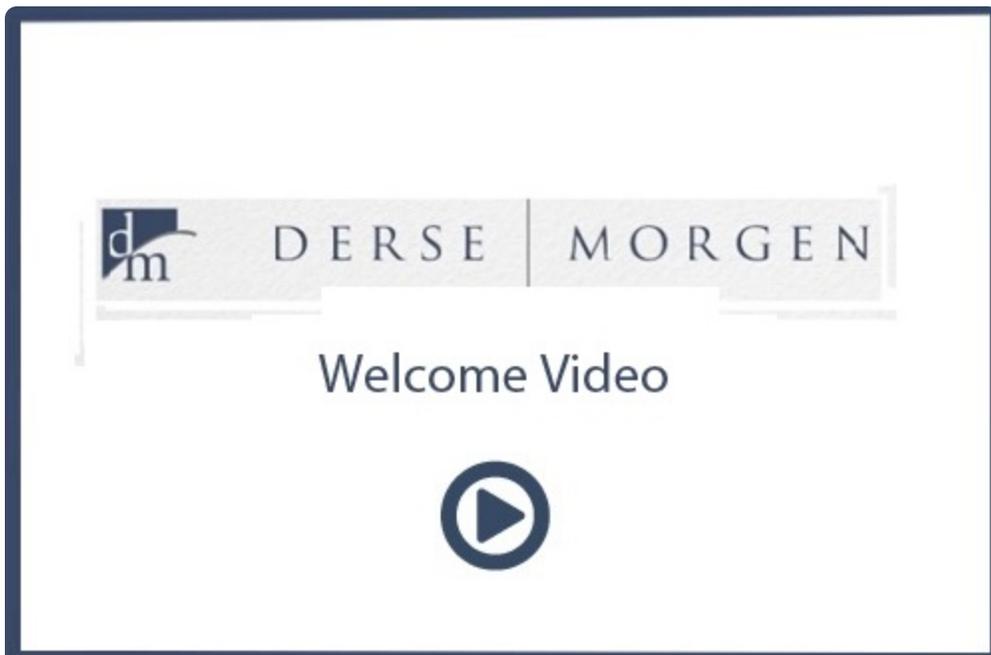
☎ 704.897.0487

🐦 in f

## Welcome to Derse | Morgen Financial Advisors

Derse | Morgen Financial Advisors is an independent financial services firm located in Lake Norman and Charlotte, NC. We advise individuals and families at all stages of life who want to simplify their financial lives and make smart decisions with their money. We also provide advice to business owners regarding retirement and succession planning, selling their business, and tax and estate planning.

We look forward to learning about you and earning the opportunity to become your trusted financial partner. If you would like more information about our firm, please contact our Lake Norman Office at 704-897-0487. You can also email us at [yourbestfuture@dersemorgen.com](mailto:yourbestfuture@dersemorgen.com).



## ABOUT US

By choice and design, we are an independent financial services firm located in the Charlotte, NC area.

[Read More](#)

[Play Welcome Video](#)



## WHAT WE DO

Our services are provided to individuals who need the professional expertise commonly associated with large institutions, but require the responsiveness and personal attention of a "boutique" financial services firm.

[Read More](#)



## CONTACT US

Please Contact Us if you are interested in more information about becoming a client of our firm.

[Read More](#)

📍 11330 Vanstory Dr.  
Suite 114E  
Huntersville, NC 28078

📍 6000 Fairview Rd.  
Suite 1200  
Charlotte, NC 28210

Derse Morgen Financial Advisors

Office: 704.897.0487

📠 Fax: 704.948.6441

[YourBestFuture@dersemorgen.com](mailto:YourBestFuture@dersemorgen.com)



Check the background of your financial professional on FINRA's [BrokerCheck](#).

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation. Some of this material was developed and produced by FMG Suite to provide information on a topic that may be of interest. FMG Suite is not affiliated with the named representative, broker - dealer, state - or SEC - registered investment advisory firm. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

Securities and advisory services offered through Woodbury Financial Services, Inc., member [FINRA/SIPC](#). Insurance offered through Derse Morgen which is not affiliated with Woodbury Financial Services, Inc. This communication is strictly intended for individuals residing in the states of AL, AZ, CA, CO, FL, MI, MN, MS, NC, NJ, NY, OH, PA, SC, TN, TX, WV, WY. No offers may be made or accepted from any resident outside the specific state referenced.

© Copyright 2019 FMG Suite.