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MORGAN STRATEGIC WEALTH

EDUCATE • PLAN • ACT

(845) 834-4343

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Client Centered

We understand that you face unique challenges along your journey to retirement and life after work. We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses on your needs, wants, and long-term goals through our "Educate, Plan, Act" process.

Our team of professionals has over 50 years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you and your family.

Your Team

John S. Morgan, AIF®, APMA®

President, Chief Investment Officer

I enjoy helping families work toward their long-term goals using our firm’s “Educate, Plan, Act” process. Experience has taught me that my happiest clients have used each of these steps to take stock of their current...

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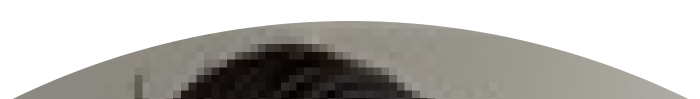

Brian S. Geary, Esq.

Director - Asset Allocation

As part of your Morgan Strategic Wealth, LLC team, I look forward to working with you and your family on long-term financial planning and estate planning. My legal background, combined with my experience in investment management and...

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Have a Question

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Question

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Contact

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