

# Alan Morgan

Wealth Advisor



With nearly a decade of experience in the financial services industry, Alan has a passion working with individuals to understand their financial and life goals and help achieve them. His primary focus is to point his clients in the right direction on decisions with a meaningful impact to their finances, thereby removing stress and clutter from their daily lives.

Alan works to help his clients design, build and navigate a financial plan crafted especially for them. The Life Voyage Navigator™ process plots a detailed course for a person or family faced with a lifetime of complex financial choices and challenges. Alan makes sure he understands goals before creating the unique plan to reach them and then make the trip with clients as their trusted guide from beginning to end.

Before joining Carolina Planning Consultants LLP in March 2011, Alan worked with LPL Financial and their advisors ensuring they received the support necessary to focus more attention on their clients. Alan learned how advisors reduce complex investment information and industry jargon to meaningful action items for their clients. He played key roles in initiatives to enhance the services LPL Financial provides to its affiliated advisors. This experience gives Alan a true understanding of what it means to be full service and to make clients your priority and primary focus.

Alan holds a Bachelors of Science degree in Economics from the University of North Carolina at Charlotte. As a student, he founded the ice hockey program and later became head coach, completing USA Hockey's Coaching Education Program Level 4 designation. He currently serves team's General Manager and is on the advisory board for Hockey Ministries International.

Born in Georgia, frequent relocations allowed Alan and his family to visit large parts of the country including many national parks. He enjoys running in local road races and backpacking along the Appalachian Trail when not working on his condo.



**Securities Licenses:** Series 7, 66

**Insurance Licenses:** Life, Accident and Health, Long-Term Care, Medicare Supplement, Variable Products

*The Life Voyage Navigator™*

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