

**INVEST
WITH
CLARITY.**

**LIVE
FREELY.**

OUR STORY



OUR FOUNDER

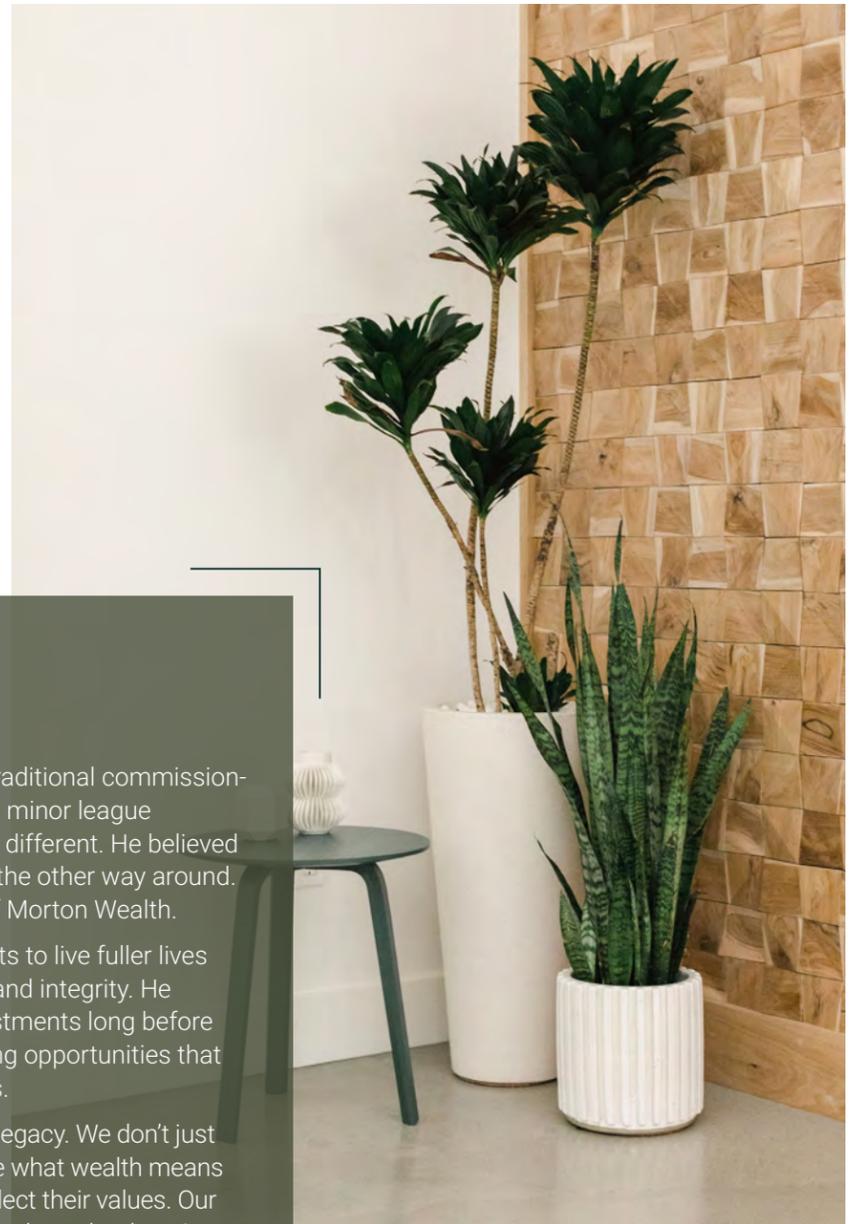
1945-2017

In 1983, Lon Morton left behind the traditional commission-based financial world, and a career in minor league baseball, to build something radically different. He believed that wealth should serve people, not the other way around. That belief became the foundation of Morton Wealth.

Lon's vision was bold: empower clients to live fuller lives by investing with purpose, intention, and integrity. He pioneered the use of alternative investments long before they were mainstream, always seeking opportunities that aligned with his clients' best interests.

Today, Morton Wealth continues that legacy. We don't just manage money, we help people define what wealth means to them and design strategies that reflect their values. Our mission is to empower better investors through education, thoughtful planning, and a commitment to ethical excellence.

We believe that when you understand the purpose behind your wealth, you make more intentional decisions. You feel more confident. More fulfilled. More alive.



Our Mission

To give our clients the clarity they need to live with freedom, confidence, purpose, and courage.

Questions

YOU MIGHT BE ASKING YOURSELF

Jeff Sarti
CHIEF EXECUTIVE OFFICER

LIFESTYLE

I want to leave a legacy. What's the most thoughtful way to build generational wealth?

I lost my partner. Who can I trust now to help me make the right financial decisions?

How do I make smart decisions with **money I inherited**?

I've saved a lot, but is it enough to live the life **I want in retirement**?

How do I prepare my children or heirs to responsibly manage inherited wealth?

PLANNING

If something unexpected happens, **will my insurance actually protect me**?

How can my financial team work together (CPA, financial planner, attorney), instead of in silos?

How much should I put into investments, including my retirement accounts?

Am I paying more in taxes than I need to and missing opportunities to keep more of what I earn?

I'm worried about healthcare in the future, how can I plan for that?

BUSINESS OWNERSHIP

How do I grow my business to fulfill my goals?

Will I be able to sell my business and support retirement?

Do I have the best team of advisors for my business?

Am I maximizing tax benefits?

Questions

YOU MIGHT BE ASKING YOURSELF

INVESTING

Are there smarter ways to generate income from my investments without taking on more risk?

I've done well, but I dislike the ups and downs. Can my portfolio be more stable?

What's the best way to balance liquidity needs with long-term wealth preservation?

How do I integrate real estate, private equity, and alternative investments into my financial plan?

Stocks make me nervous, is there a safer way to invest?

My friends seem to be doing things I'm not. What am I missing?

Our Commitment
To never put you in a box.
Your journey is your own.

YOUR LIFE IS
COMPLEX



OUR PROCESS BRINGS
CLARITY

1

DISCOVER WHAT MATTERS MOST

We begin by understanding the complexity of your life—your values, your vision, and the goals that drive you. This isn't just about numbers; it's about what fulfillment looks like for you and those you love.

2

BRING QUESTIONS INTO FOCUS

Using thoughtful financial projections, we turn uncertainty into clarity. Whether you're wondering about retirement, taxes, or legacy, we quantify your questions so you can make confident, informed decisions.

3

BUILD A PORTFOLIO THAT SUPPORTS A COURAGEOUS LIFE

We design a resilient investment strategy tailored to your unique path—one that supports your goals through life's ups and downs, so you can live boldly, with purpose and peace of mind.



Resilient by Design

INVESTMENTS THAT POWER YOUR FINANCIAL JOURNEY

Meghan Pinchuk
CHIEF INVESTMENT OFFICER



As you think about designing a portfolio to support your financial journey, we invite you to explore asset classes that showcase the breadth of options we offer. Our goal is to curate portfolios that generate income, are diverse and work towards long-term growth, in an effort to give you greater confidence in your future.



WATCH TO
LEARN MORE
ABOUT OUR
INVESTMENT
APPROACH



U.S. STOCKS

PRIVATE EQUITY

OPPORTUNISTIC BONDS

INTERNATIONAL STOCKS

DIVERSIFIED LENDING

REAL ESTATE LENDING

COMMODITIES

SHORT-TERM BONDS

REAL ESTATE EQUITY

Presented for illustrative purposes only. Some investments referenced herein are available only to eligible clients and may involve a higher degree of risk.

THE BEST FINANCIAL PLANS ARE MORE THAN JUST NUMBERS

They're about protecting what matters
and pursuing what fulfills you

Thoughtful
**SPENDING
STRATEGIES**

PORTFOLIOS
designed to support
your goals

**BUSINESS
SALES**
& transition
planning

**TAX
PLANNING**
that gives you
money back

Supporting your
**CHILDREN
& GRANDKIDS**

**GIVING
BACK**
to your community

INSURANCE
that minimizes risks

**ESTATE
PLANNING**
with intention

Securing your
**RETIREMENT
& HEALTHCARE**

A PARTNERSHIP THAT SERVES YOU

Every client is supported by a dedicated advisory team, backed by financial planners, investment research professionals, and operations teams.

This approach allows your advisor to spend more time truly getting to know you – your goals, your values, and your vision for the future – while a team of focused specialists works behind the scenes to ensure every detail is thoughtfully managed.

No Hidden Fees. Just Honest Advice.

Our clients pay a straightforward fee, subject to a \$15,000 minimum. **1% on managed assets up to \$5M, and .5% thereafter.**

No commissions. Just advice that is curated for each individual client and family.

BY THE NUMBERS

Our history & experience

AUM and other data current as of 12/31/2025. Morton became an SEC-registered investment adviser in 1983. SEC registration does not imply a certain level of skill or training.

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LEADERSHIP
TEAM
MEMBERS

58

TEAM
MEMBERS

40⁺

PRIVATE
INVESTMENTS
IN CLIENT
PORTFOLIOS

6

CHARTERED
FINANCIAL
ANALYSTS
(CFA[®])

1200⁺

CLIENTS WE
SERVE

2

CERTIFIED
EXIT
PLANNING
ADVISORS
(CEPA[®])

\$3.4B

ASSETS UNDER
MANAGEMENT

42

YEARS SINCE
FOUNDED

18

CERTIFIED
FINANCIAL
PLANNERS
(CFP[®])

1

CERTIFIED
DIVORCE
FINANCIAL
ANALYST
(CDFA[®])

7

INVESTMENT
TEAM
MEMBERS

KNOWLEDGE FIRST.

We believe the most successful investors are those who feel informed, confident, and in control. That's why we invest heavily in educational resources—so you can learn about our philosophy, explore our strategies, and get to know our team before making any decisions.

Whether you're watching a video or reading an article, every piece of content is designed to empower you with clarity and insight.

ACTION WHEN YOU'RE READY.



Learn More About

How We Can Partner

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our **website**

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YouTube

READ
our CEO's
Newsletter

SEE
what others have
said by searching our
Google Reviews

Continue the conversation

Scan the QR code to schedule a call with an advisor.

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Interested in learning more about how we work with clients who are still building wealth? Visit mortonwealth.com/modern



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There is no guarantee that the investment objective of any of the strategies discussed will be achieved. Past performance is no guarantee of future results. All investments involve risk, including the loss of principal.

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