

mortonwealth

careers



Our Mission: We empower team members to enjoy their lives through a collaborative culture that inspires them to get the most life out of their careers.



mortonwealth promise

Find your VOICCE! What inspires you?

Vision – Being part of an organization that creates meaning and purpose

Opportunity – Career growth through training, development, and clear expectations related to advancement

Incentives – Fair and transparent compensation and benefits package; flexible work schedule

Impact – Engaging in work that makes an impact towards the company vision

Community – Teamwork and collaboration with co-workers

Communication – Organizational transparency where leadership regularly reports on state (strengths/weaknesses) of the company

Entrepreneurship – Ownership mindset where you define how you work (leadership, creativity, ability to push boundaries)

Meaningful Work

- With every strategic decision we make as a company we ask if it furthers our purpose of empowering families to enjoy their lives.
- We are committed to encouraging you to work in a way that makes an impact on you, your team and our company.
- The four walls of Morton Wealth are a safe place for us to share, learn and collaborate with our teammates. Outside of our office space we celebrate together (families too!).
- We are supportive of team members' charitable endeavors within the local community.
- We participate in retreats and off-site sessions where you can help shape company-wide and team-based initiatives.

Vision: Being part of an organization that creates meaning and purpose

Career Development

- Robust onboarding training process where all new team members learn about the company's purpose as well as our processes & procedures for specific positions
- Detailed Career Development Plans with clear expectations for success
- Developmental positions dedicated to education and learning with primary goal of career advancement
- Dedicated time for industry education in a collaborative "classroom" environment
- Personal development and communications training
- Leadership and management training
- All new team members paired with mentors from a different team
- Culture of sharing mistakes with colleagues so we can learn from one another.
- Culture of learning, curiosity and creativity
- Innovation tournaments – everyone has a voice in developing new company-wide initiatives
- Educational support (conferences, internal sessions, designations).

Rewards/Recognition

- We are passionate about setting clear expectations for how we define success
- Personalized Career Development Plans are highly detailed with both qualitative expectations and quantitative metrics
- Recognition and feedback – monthly one-on-one check-ins with your direct supervisor
- Stretch goals encouraged for all team members so they can do more than they ever thought was possible
- Compensation philosophy is intricately tied to our core values
- We are committed to fair compensation and are transparent on salary ranges as defined by industry benchmarks
- Incentive compensation is team focused to promote collaboration
- Competitive benefits package (401k match, healthcare/wellness, time off, charitable support, other perks)
- Transparent path towards equity ownership for meaningful contributors to the firm's mission.



we encourage
a culture of
learning,
curiosity and
creativity

employee promise

Excellence

- ▶ We define excellence as the standards that you expect from yourself. After all, taking pride in one's work is good for the soul!
- ▶ Detailed job descriptions and Career Development Plans are in place to help you get to wherever you want to go. We expect you to take ownership over your career and ask questions that will help guide you so that you can thrive at your position.
- ▶ Our goal is to continually improve as an organization, and we expect the same inner drive from our team members. We look for individuals who are passionate about their personal learning and career growth.

We see our mistakes as **opportunities for growth**. By sharing them openly, we learn from each other.

Empowerment

- ▶ We are committed to providing you with resources and support for you to be successful. In return, we ask that you hold yourself accountable and take pride in your work.
- ▶ We are committed to empowering our clients through our dedication of delivering superior client service. It is through this heightened level of service that we provide confidence to our clients so they can delegate their financial concerns to us, free of worry.
- ▶ We empower our teammates through encouragement; we do not solve our teammates' problems, but rather provide the support, coaching and resources they need to be successful.

We are deeply and authentically committed to our careers, the lives of our clients, our teammates and **bettering our community**.

We believe that **investing starts with investing in ourselves**. We are lifelong learners who take ownership of our personal and professional growth.

Engagement

- ▶ We are all responsible for our culture and take ownership for the part we play in creating a positive environment for our teammates.
- ▶ We embrace the value of social connectedness – together we will further our goal of lifelong learning.
- ▶ It is our responsibility to lift each other up, avoid gossip and care about how people feel in the organization and advocate for the positive experience of each of our teammates.
- ▶ Success in our roles is not measured purely by our ability to execute tasks and complete projects, but also by the impact we make on the organization.

Empathy

- ▶ We work in teams and are passionate about the fact that collectively we can accomplish more than we can individually.
- ▶ When working with teammates, we expect that individuals approach conflict with the assumption that your teammates' intentions are good and that they are acting in the best interest of the collective whole.
- ▶ When mistakes or issues arise, blame is an unacceptable first reaction; typically a process needs to be fixed or expectations have not been clearly set. Problems should be viewed as opportunities to learn and grow from rather than as something to fix.
- ▶ Patience with our clients is paramount. We are often the most important relationship a client has outside of their family, so they depend on us to be a confidant and consultant on many aspects of their personal life.

We value the unique perspective of each of our teammates, recognizing that **we can accomplish more together** than we can individually.

Ethical

- ▶ We expect our team members to always act in our clients' best interests, no matter what!
- ▶ Treat others with respect at all times.
- ▶ Honest conversations may be challenging but are crucial when the goal is to find solutions as opposed to vent about problems. Gossip is not tolerated.
- ▶ Spend the necessary time to do something the right way as opposed to cutting corners at the expense of clients or teammates. Don't take shortcuts.

We cultivate meaningful relationships. The more connected we feel to each other, the more **we enjoy our work**.

Enjoyment

- ▶ It is a prerequisite that employees look forward to coming to work. Positive engagement is only possible if you truly enjoy the work you do and appreciate the value you (and your teammates) add to Morton Wealth and to our clients' lives.
- ▶ We spend more time at the office than we do at home. It is essential that teammates enjoy the camaraderie of their teammates and look forward to social engagement with one another.

We trust that **our teammates' intentions are good**. We hold each other accountable to acting in the best interest of the collective whole.





mortonwealth.com hello@mortonwealth.com