

TONY MORGAN

Primary Role

Taking pride in the provision of tailored financial advice that is personalised to your individual needs.

Fast Facts

- ◆ Investment Fund Advisor
- ◆ UK Financial Planning Certificate (1995) & Advanced Financial Planning Certificate (2005)
- ◆ Extensive UK Wealth Management, International Retail Banking expertise with commercial, corporate and retail clients
- ◆ Formerly Regional Director, Western Canada for Lloyd's Banking Group
- ◆ Clientele: Business Owners, and Entrepreneurs, British Expatriates
- ◆ Partner: Danielson Group Wealth Management

Service Summary

- ◆ Integrated wealth planning delivery
- ◆ Financial DNA and values assessment
- ◆ Comprehensive Insurance Review
- ◆ Tax, Estate and Will Planning
- ◆ Annual family general meeting (AGM)
- ◆ "Personal CFO" approach
- ◆ Wealth 360 process delivery and implementation

Financial DNA: Relationship Builder

Relationship Builders naturally thrive when given the opportunity to help, encourage, or co-operate with others. They are loyal to family, advisors and institutions and gain fulfilment by working with others to achieve goals. Their preference is to live in a stable environment and make decisions based on history and security.



Tony joins us after 22 years of working in a variety of specialist advisory roles within the commercial, corporate and retail divisions of UK's largest retail bank. Throughout his career he has successfully advised a wide range of professionals including Queen's Counsel, Corporate CEOs and Entrepreneurs.

Tony's success has been built upon the solid foundation of strong client relationships, his passion to help others fulfill their dreams and attention to detail. Combined, Tony has found that these three main ingredients, together with clear communication can deliver a true holistic planning experience.

2008 marked a special turning point for his family when he was selected to act as Regional Director of Western Canada for his Banking Group and move to Vancouver.

After experiencing the Vancouver lifestyle, it was an easy decision for Tony and his wife Daniela to stay and they are now thrilled to be raising their two children in the most beautiful place on Earth. He enjoys spending time with his family, skating, golfing and continues to follow his favourite football team in the British Premier League.