



# Origin Stories

Jon Wingent, Wealth Advisor

“It is personal experiences that translate when working on financial plans with clients. Control what you can with a plan!”

## What lessons have you learned from your past work life that you've brought to Morton?

I have been lucky to work with many great, inspirational people during my past work life and as I've progressed in my career, I've seen firsthand journeys of success and achievement in others and witnessed the qualities and habits they employed in order to achieve that success. I have then adopted that learning into my own approach.

Some of the qualities I have witnessed that have delivered the most success for businesses and individuals have been empathy, emotional intelligence, and teamwork. At Morton, these values are all evident in abundance, and the true team approach—the sense of togetherness—fills me with confidence that there will be continual success for this business and the clients it serves. Most of all, I have learned that you have to truly enjoy what you do!

## What personality traits do you believe have set you up for success at Morton?

I am a planner by nature. I make lists—lots of lists—and am meticulous about planning. Indeed, leaving my career in the UK and relocating a young family to the United States would not have been possible without a well-implemented plan. From selling a home to finding a new one, leaving schools to then finding new schools, and establishing the family into a new community, our lives went through some big changes.

Things like having sufficient liquidity was key during the transition and it is a personal experience that translates when working on financial plans with clients. Control what you can with a plan!

## What was the turning point for you in deciding to change careers?

