



Origin Stories

Wade Calvert, CFP®, Wealth Advisor and Partner

I was able to learn a tremendous amount of investment and financial planning skills in a short amount of time. My passion for the world of investing came back and I've been doing it ever since.

How have your career aspirations changed over the years leading to this point?

When I first started out in this field, I wanted to run my own investment fund. Finding opportunities excited me and drove me to want to uncover more. Throughout my life, I have naturally searched for trends and patterns. Perhaps it's my enjoyment of puzzles and games of probability that attracts me to patterns or trends.

Whatever the reason, as much as I enjoy that aspect of being an advisor, throughout the years I have realized that what I enjoy most about my work is being able to engage with clients and learn more about their goals, values, and passions. I love hearing about their personal and family history, how they built their business, or how they identified opportunities throughout their lives. Everyone's story is unique and getting the chance to listen to someone tell theirs is one of my favorite things about being an advisor.

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

Everyone has a role to play in an organization. When I was younger, my father owned a meat packing plant, and I would work for him over summers and Christmas vacation. For most of us, when we go to a restaurant and order a steak, we are only thinking about how we want it cooked and how it is going to taste. I was able to see another side to it. It started with waking up early in the morning at 3 AM to get to the plant by 4. The first thing to do was get all the orders from the evening before to plan out the requirements for the day ahead. Next, we would check in with the evening cleaning crew to ensure the workstations were cleaned, sanitized, and ready for the day. Then it was time to check in with the inventory manager to see what additional supplies needed to be ordered. Depending on the supply needs, we may have needed to contact the wholesalers to price out options and coordinate delivery. By 5 AM, the butchers and other workers began to show up. We would take the orders from the day before and start to cut the various types of steaks depending on the order form—New Yorks, top

sirloin, filets, T-bones, and porterhouses—you name it, we cut it. Then once they were cut, the packaging crew vacuum sealed the steaks and placed the items in a box for that specific restaurant. The loading crew then took all of the orders boxed between 5 AM and 8 AM and got them on the trucks for delivery. By 9 AM, the truck drivers showed up to start their day delivering all the steaks to their list of restaurants on their itinerary. Once the steak was delivered, more work still needed to be done.

The restaurant chefs needed to prep the steak, season it, and cook it to the perfect temperature that you just ordered. Waiters and food runners needed to be available to bring the steak to you. As you can see, there are a lot of steps required and a lot of people involved with even the simple task of ordering a steak for dinner. If anyone fails to do their job along the way, it can cause a disruption or an outright problem for the final user—in this example, the customer ordering the steak.

Oftentimes, some of these individuals behind the scenes do not get enough credit for their involvement. One of the unique things about Morton is that we have an amazing team, and we strive to recognize employees for outstanding work at our weekly kickoff meetings. This, coupled with our core values of empowerment and excellence, have driven employees to constantly strive to provide a great experience to our clients and to help other colleagues excel in their careers.

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

