



Origin Stories

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

For some, their personality is pretty set from birth, and then there are the rest of us who find our voice along the way. I was not always the extroverted and exuberant person that I am today. I was the shy, apprehensive kid who grew up to have a thirst for adventure. My pure joy for life, expressed in bouts of spontaneous, unrestrained laughter, is sometimes startling for the more hearing-sensitive individual but it also grows on people. One of my values is to create community wherever I find myself. Fortunately, I was born into a family that prioritized protecting one another and your own well-being. This upbringing is what molded my personality to create a great group of friends outside of my family.

This same community is something that I strive to create with my team members at Morton Capital. Starting from humble beginnings as an intern and working my way through the ranks of various job titles has granted me the mindset to be more empathetic to all members of our firm. I love telling my story to new members of the firm because it was not always the most glamorous work (trust me, I know!) but it was work that contributed to the good that we provide the world. Financial security is one of the most important components to an enjoyable life and through the work that we do at Morton Capital, a small role makes a big difference for individuals and their families.

Thinking back on your past work experience, what moments have given you the most satisfaction and fulfillment?

When I reflect back on my past work experience, I really love the times when I had the opportunity to support another team member. Before I came to Morton Capital, I worked at a community foundation that had initiatives that ranged from economic justice to environmental justice to even LGBT+ justice campaigns. I worked in the finance department and my primary role was maintaining and facilitating the effective use of the nonprofit's cash flow. Although, when I had the capacity to do so, I enjoyed working the program events that the organization would sponsor and tried to make sure that the teams had all the support they needed to make the events a success. Whether the event was a fundraiser or a service-based event to uplift the

youth, I enjoyed being behind the scenes and helping my team's event be a success.

Now being a part of the team at Morton Capital, I appreciate the guidance I received to give praise in public and not-so-great feedback in private. During internal meetings in the office, we encourage everyone to share their wins but also their failures. The

best way for all of us to be excellent in our work is to learn and teach each other from our past experiences. Whether it is an experience I had with a client of Morton Capital or with a community member from a previous role, some gems stick with me and it is fulfilling to be able to recall those gems and share them with my peers. With every company I have ever worked with, if I did not enjoy the people on my

team, I did not stay very long. Being in the boat together rowing in the same direction is what has always satisfied me in my role and I continue to do that with my team, my clients, and their families.

Has there been a common thread in the work experience you've had so far in life?



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