



Westland Financial Services, Inc.
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Timothy Morton Chief Executive Officer



Westland is a premier national insurance marketing organization supporting financial professionals of broker/dealers, registered investment advisors, banks and credit unions. We believe that the concepts, strategies and products we promote are essential in every client portfolio because we know and understand that the best laid financial plans can be easily derailed by early death, sickness or disability.

We specialize in supporting financial professionals with case designs related to retirement income planning, life insurance, disability insurance and long term care insurance. Tim's partner, Gene Pastula CFP®, is also the founder and president of Westland and together with their team, enjoy working alongside and supporting over 5,000 contracted advisors. Westland is licensed in all 50 states.

Before joining Westland in January of 2007, Tim was with James Mitchell & Co (JMC) for 12 years and led that organization since 2000. JMC was one of the first firms to provide financial services support to banks and credit unions with over 600 Advisors working in the branches of financial institutions. He was also President and CEO of JMC Financial Corporation, a full service FINRA (Financial Industry Regulatory Authority) Broker/Dealer and President of JMC Insurance Agency. JMC successfully assisted clients to safely invest nearly \$4 billion of their retirement savings and investment portfolios. Mr. Morton started his financial services career at Private Ledger (now LPL) in 1982.

Mr. Morton remains active in the financial services community, is a member of the Financial Planning Association and was elected in 2013 to be a member of FINRA's National Small Firm Advisory Board (SFAB). Tim has also served as a long-time member of the Board of Directors for the National Association of Broker/Dealers (NABD), an industry advocacy organization. His participation, willingness and industry expertise has contributed to assisting regulators with understanding the value of the Advisor Client relationship and the impact rules and regulations have on small business.

Tim holds a current Life, Disability and Long Term Care Insurance license and previously held FINRA Series 7, 24, 51, 63, 79 and 99 licenses.

Tim enjoys speaking to groups of all sizes or one on one. Call or E-mail his office today to meet with Tim, a real financial professional. You will find his professional approach and industry knowledge very refreshing.

Tim and his wife Kathy were both born and raised in San Diego, have been married 36 years and have raised 3 sons.

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