



Timothy U. Morton

Tim has been in the financial services industry for over 35 years. He is the Chief Executive Officer of Westland Financial Services, a firm that specializes in supporting top financial professionals with their client's financial plans, especially related to a successful retirement, income planning, life insurance, disability insurance and long-term-care protection strategies. Westland is insurance licensed in all states supporting over 1,500 financial advisors. Tim enjoys working directly with advisors and their clients as the advisors trusted partner to handle part of a client's portfolio or specific product or to help implement new insurance strategies. Tim has a team of very experienced staff and affiliations to support him and his firm including expertise for Advanced Estate Planning, Medicare Planning and Individual and Group Health Plans.



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 Financial Advisors working in the branches of financial institutions. He was 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 that rules and regulations have on financial service entities and individual financial planning practices.

Mr. Morton thrives on giving back. He founded the Ramona Parks and Recreation Association (RPRA) and served as its President and Chairman for 12 years. RPRA is 501(c)3 organization that serves all the youth sports needs of the community, hosts large public Rodeo and fair events, and helps to operate the Community Center which is also home to Ramona's Senior Center. Tim also enjoys serving as a church Lector.

Tim and his wife Kathy have been married 43 years and have three adult sons.

Tim attended Coleman College and San Diego State University and holds current Life, Disability and Long-Term-Care Insurance license and holds FINRA Series 7, 24, 51, 63, 65 licenses.

CA Insurance License 0A43356.