

ZILKER MEDIA

About Sten Morgan, CFP, ChFC

Certified Financial Planner and President of Legacy Investment Planning



Sten Morgan, CFP, ChFC, is a leading voice in the financial services industry and one of the most accomplished young advisors in the country. He founded [Legacy Investment Planning](#) by age 25 and was named a “40 under 40” advisor by [Investment News](#) at age 30. As president of Legacy, he strives to effect positive change in the industry, coach and support other advisors, and bring true value and vision to his clients.

Sten’s creative and proactive approach to financial planning and consulting is disrupting the financial advice space. In addition, he helps other advisors become more fulfilled and successful in their work. In [7 Mindsets of Success: What You Really Need to Do to Achieve Rapid, Top-Level Success](#) (Morgan James Publishing, February 2017), he shares tips and advice for building a

successful business, including the seven mindsets that helped him become a top financial advisor with his own firm at such a young age. He speaks at schools and conferences, teaching these same principles to budding entrepreneurs and experienced financial advisors alike.

Sten began his career at Northwestern Mutual and Raymond James Financial. During his time as a financial advisor with Raymond James, he worked with clients to develop in-depth financial strategies that went beyond their finances to understand their needs, lifestyles and more in order to achieve their financial goals. This passion for holistic strategy inspired him to found Legacy Investment Planning.

Sten is one of the youngest advisors ever named to the [Chairman’s Council](#). In addition, he was named a 30 under 30 advisor for millennials making a transformation in their industries by [Think Advisor](#), and he has also received the 30 in their 30’s award for nonprofit leaders in Tennessee. Passionate about giving back to his community, Sten was a founding board member of Tucker’s House, a 501 (c)(3) non-profit organization that partners with the families of children with disabilities to make their homes safe and accessible.

A Certified Financial Planner and a Chartered Financial Consultant, Sten graduated with a Bachelor of Science in finance and economics from Linfield College in McMinnville, Oregon. He lives with his wife and three children in Franklin, Tenn., where he enjoys traveling and golfing in his free time. For more information, please visit www.stenmorgan.com.