

## Morrow Thornton Financial Team



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### Investment Philosophy

Richard Morrow and Anna Morrow Thornton understand how to translate economic knowledge into investment decisions for their clients. One of their investment distinctions is they care as much about what you don't own as what you do own. They utilize active investment management, risk reward analysis and fee-based services to align their interest with those of their clients. With a long history as a fund manager and business owner, Richard knows how to balance risk and reward properly to achieve the best possible results. Anna's experience as a bank officer and business owner herself allows her to step into the shoes of her clients to help them understand where they are financially, and where they want to go.

Together, the Morrow Thornton Team develops for each client an investment plan that matches the client's individual profile. They provide additional services to make sure each client's needs are met. They deliver consistent excellent service through regular personal attention regarding investments and related matters.

### Richard and Anna's Services include the following:

- Take stock of your current financial picture, including a review of all existing assets and liabilities.
- Determine each client's investment profile, based on your financial goals and risk tolerance.
- Create a personal balance sheet, a cash flow statement, a budget and a plan for the future. Where necessary, this includes recommendations to consolidate assets.
- Develop an annual plan to live within your means; assist with tracking monthly expenditures.
- Assist with your estate planning by recommending and, if desirable, accompanying you to meet with estate law professionals.
- Develop strategies to save for major expenditures, including large purchases, life insurance premiums, taxes charitable giving and other substantial outflows.
- Formulate short-term and long-term financial goals for those with major life changes.



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