



## BRAD MORGAN, CFP®

**Founder, Managing Director**  
Beyond Wealth Partners

Brad Morgan is the founder and managing director of Beyond Wealth Partners, a specialized financial planning practice powered by Savvy. Brad oversees the firm's strategic direction, focusing on sophisticated tax planning and wealth management for high-net-worth families and corporate executives.

Brad founded Beyond Wealth Partners to provide a technical, engineering-minded approach to financial planning. Under his leadership, the firm has become a prominent resource for the Procter & Gamble (P&G) community, leveraging Brad's tenured history with the company to navigate complex compensation structures and retirement distributions.

Brad's deep ties to P&G span generations, representing a combined family legacy of over 140 years of service. His own career began with nearly eight years at the company in Research & Development and Engineering, where he met his wife, Jenny, herself a 14-year veteran of the firm. This heritage includes his father and uncle, who each dedicated 35 years to P&G, his grandfather with 30 years of service, and his father-in-law with 20 years. This unique, multi-generational perspective provides Brad with an insider's understanding of the company's benefit plans, including net unrealized appreciation (NUA) strategies and stock option optimization.

Before founding Beyond Wealth Partners, Brad served as an investment advisor at Mariner Wealth Advisors. He transitioned into the financial services sector in 2014, subsequently earning the CERTIFIED FINANCIAL PLANNER™ designation.

Brad earned both his Bachelor's and Master's degrees in Mechanical Engineering from the University of Tennessee. He graduated Magna Cum Laude for both programs, completing his graduate studies in 2008. In 2016, he obtained his Certified Financial Planner™ certification from the College for Financial Planning. Brad lives in Madeira, Ohio, with his wife, their four children, and their dog. He and his family are active members of the Crossroads Church community and enjoy traveling together.

Brad has been a competitive cyclist since 2013 and currently races with the 11eleven cycling team. His commitment to the discipline of the sport extends to his support of the cycling community, where he is involved with the Lionhearts and Get Rad Devo junior racing teams, the Naples Velo Bicycle Club, and HigherDose Professional Women's Cycling.

In addition to his athletic pursuits, Brad is a supporter of the Homeless Animal Adoption Team (HART) rescue. He believes that the discipline, endurance, and community-mindedness required in these endeavors are central to the mission of Beyond Wealth Partners: providing a tireless, patient effort to help families secure their financial futures.

Follow Brad on [LinkedIn](#) to see his latest updates.