

# Biography – Jacquie Morgan

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## Personal:

I am so blessed to work with an amazing team and our clients at Buttonwood while getting to do what I love best – accelerating growth and entrepreneurship in our community! So many of our Buttonwood clients have businesses and helping to facilitate their business growth and take it to the next level through ideation and operational strategy is such a joy.

Outside of the office, I love a great book on my front porch, cooking and entertaining, spending time with my husband Don and my children (Augustine – 22) and Isabella (15) and our two boxers, Rufus and Josie and traveling to warm climates!



## Chief Operating & Growth Officer

Jacquie is responsible for driving operational results within Buttonwood and positioning the firm strategically for innovation and growth. In this leadership role, Jacquie oversees all operational functional areas of the firm with an emphasis on alignment of process and technology for efficiency and strategic profitability enhancement. Jacquie brings 20+ years of business leadership growth and consulting experience spanning the entrepreneurial community to multinational corporations with her passion focused on fueling growth initiatives for growth-stage organizations. Mixing expertise in collaborative culture design, agile execution, technology enhancement, business process engineering and digital marketing expertise, Jacquie is a successful business leader with proven experience accelerating growth.

## Professional & Community Involvement:

- Chief Operating & Growth Officer, Buttonwood Financial Group, LLC: 2023 – present
- Senior Vice President - Enterprise Transformation, EVERSANA: 2019 – 2023
- Chief Executive Officer/Founding Partner, BalancePoint, Inc.: 2004 – 2018
- Driven to Extraordinary (DTEE), Women’s Executive Leadership Forum: 2022 - Present
- Advisory Board Member, Bank of Oklahoma: 2017 – 2020
- Board of Directors, Missouri Bank: 2015 – 2016
- Kansas City Women Who Mean Business: 2014 – Present
- Helzberg Entrepreneurial Mentoring Program – HEMP, Fellow: 2010 – Present

## Mission: Buttonwood Financial Group, LLC

At Buttonwood Financial Group, we believe that as wealth builds, life doesn’t get simpler – it gets more complex. We simplify the financial process for families that would like to protect and grow their money. As Your Family CFO, we focus on the creation, implementation, and ongoing strategy in your financial life. We provide comprehensive tax, insurance, estate, investment, cash flow, retirement, education and business strategies – all integrated into your life and focused on your objectives.