

Biography of STEVE MORRIS, CFP®

Steve Morris has been a **Certified Financial Planner™ (CFP®)** practitioner since 1988. He has been providing financial planning services throughout Nebraska since 1978 while residing in Lincoln, NE. He also serves clients in several other states including Kansas, Minnesota, Virginia, Texas, Arizona, Ohio, Iowa and Nevada.

Steve is a graduate of the University of Nebraska at Lincoln, receiving both his undergraduate and graduate degrees from UNL (B.A. in 1969 and M.A. in 1970) majoring in Economics and Math. Prior to attending UNL he attended the U.S. Naval Academy at Annapolis, Maryland, for two full academic years. He is also a graduate of the professional education program offered by the College for Financial Planning in Denver, Colorado, where he received the CFP designation in 1988. He was awarded the CLU (Chartered Life Underwriter) professional designation by the American College in November 2004.

Steve is a charter and founding member of the Nebraska Chapter of the Financial Planning Association (FPA), formerly known as the Institute of Certified Financial Planners. He served as the President of the State FPA in 1992, Vice-President in 1991, Secretary-Treasurer in 1990, and the Chairman of the Government affairs committee in 1989. He is a current member of the National Financial Planning Association.

In 1990 Steve began a specialization of helping families who have a “special needs” child with their very unique financial and estate planning needs. Formerly, he provided these services through his own firm **Life Planning for Persons with Disabilities (LPD)**, while he now provides such services through **Life Planning for Special Needs Children (LPSNC)**, a division of the **Kolb Foundation for Disability Education, Inc., or KFDE**. He has a very personal interest in financial and estate planning for persons with disabilities since his father was disabled with multiple sclerosis for the last 25 years of his life; and his 38 year old son, Jeffrey, has been disabled since birth with Duchene Muscular Dystrophy. His commitment to this area is further evidenced by his serving on the Advisory Committee to Community Alternatives Nebraska (formerly the Lancaster Office of Mental Retardation) and the Lancaster Foundation for Mental Retardation (LFMR). In 2002 he was recognized as “Philanthropist of the Year” by the Foundation for his work and commitment to Special Needs planning for persons with disabilities. Since January 2005 he has served on the Board of Directors of the Kolb Foundation for Disability Education (KFDE) and currently serves as its President.

The balance of Steve’s financial planning practice is in the area of retirement and estate planning. This entails working with middle income families, business owners/executives, and professionals, regarding their retirement, investment, insurance, and estate planning. His primary focus is directed at helping his clients preserve their accumulated assets through proper planning and by stressing "safe money" investment alternatives; and then helping them identify the appropriate income strategies for their unique resources in order to meet their spending needs during their non-working years. He follows the standard financial planning model and process as established by the College for Financial Planning. These services are provided through **Resources Planning Company, Inc.**

Steve grew up in Grand Island, Nebraska, graduating in 1964 from Grand Island Senior High School. He has been a lifelong resident of the state of Nebraska other than the two and a half years he lived in Maryland while attending the US Naval Academy. He moved to Lincoln in 1967 to finish his college education at the University of Nebraska and decided to stay to raise his three sons with his wife, Susan. Other community and civic involvement includes serving on the Lancaster County Advisory Committee on Domestic Abuse, and YMCA coaching in soccer, basketball, and football.