



MORGIA
WEALTH MANAGEMENT®

**Disciplined.
Careful.**

MEET OUR FINANCIAL ADVISORS



John Johnson, MBA, CEP®

Director of Wealth Management, Partner

Mr. Johnson joined Morgia Wealth Management in 2020 as the Director of Wealth Management to focus on client relationship management and growing the business through marketing. He has over twenty-five years business management experience ranging from Fortune 100 strategic planning to brand management to recently running a portfolio of media properties.



Nico Morgia, CFP®

Financial Advisor, Financial Planning Associate

Mr. Morgia joined Morgia Wealth Management in 2016 as a Financial Advisor specializing in building comprehensive financial plans. These plans help individuals and families determine long-term financial goals, understand retirement savings needs, and develop appropriate retirement spending strategies.



Will McCanney, MBA, CFP®, CEP®, RICP®

Financial Advisor, Financial Planning Associate

Mr. McCanney joined Morgia Wealth Management in 2022 to work with individuals by assisting with comprehensive financial plans, providing investment advice, and helping guide them to meet their goals. His background in insurance helps clients develop the appropriate strategy and understand their options.

MEET OUR RETIREMENT PLAN SPECIALIST



Shane Simser, CPFA®
*Sr. Financial Advisor,
Retirement Plan Services*

Mr. Simser joined Morgia Wealth Management in 2013 to help individuals and business owners determine their financial goals and implement personalized solutions with tailored investment advice. His specialty is working with business owners to develop retirement plan solutions and assist their employees in analyzing their financial objectives, reviewing their investment options, and providing on-going education to help prepare them for retirement.

Shane was selected as one of the 20 Under 40 of Northern New York's Emerging Leaders for the Class of 2016 for his leadership in our region.

Morgia Retirement Services focuses on the business owner and employees. We can help owners create retirement plans that are cost effective, maximize tax-efficient savings, and retain employees. We help employees understand their financial lives, plan for the future, and navigate important decisions concerning saving, investing, and social security.

Visit www.morgiaretirement.com to learn more.

MEET OUR TRADING & RESEARCH TEAM



Frank Murphy
*Director of Trading,
Portfolio Management
Associate*



Mr. Murphy began his analyst career as an accountant at Beaverite Products Inc. and has been working with Morgia Wealth since 2005. He is the lead trader, responsible for precisely monitoring the portfolios for position targets, overall asset allocation, and clients' cash flow needs. He is Series 7 & 66 licensed.



Joseph Cosmo
*Sr. Analyst,
Portfolio Management
Associate*



Mr. Cosmo started his career at NBT Bank in Ogdensburg, NY and joined Morgia Wealth in 2014. He assists the team by utilizing a variety of industry and proprietary resources to gather and analyze equity and overall market data. He provides analysis to the portfolio managers to help them determine, buy, hold, and sell decisions. He is Series 7 & 66 licensed.

MEET OUR OPERATIONS TEAM



Heather Clement
*Director of Operations,
Partner*



Mrs. Clement began her career in 1994 with Merrill Lynch in Rochester, NY. At Morgia Wealth Management, Mrs. Clement is responsible for compliance, human resources, marketing, and growth through business development. She remains a client relationship manager for many multi-generational clients. She is Series 7, 63 & 66 licensed.



Katrina Goodsell
*Sr. Client Service
Associate*



Mrs. Goodsell began her career in the President's office at Jefferson Community College. She joined Morgia Wealth Management in 2013 and assists clients with complex issues and helps them simplify their financial lives. Her responsibilities include meeting with clients to establish new accounts, trusts, estates, and processing distributions. She is a New York State Notary Public.



Andrea Fiorentino
*Sr. Registered Client
Service Associate*



Mrs. Fiorentino began her career with Morgia Wealth in 2002. Mrs. Fiorentino's years of experience have allowed her to develop strong relationships with multi-generational and institutional clients. Her responsibilities include meeting with clients to establish new accounts, trusts, estates, and process distributions. She is Series 7 & 66 licensed.



Kiersten Guthro
*Client Service
Associate*



Ms. Guthro was hired in 2019 to establish accounts, process distributions and prepare for meetings. She specializes in Retirement Plan services and assists trustees and 401(k) participants open accounts, make deposits and schedule annual meetings.

MEET OUR FOUNDERS



Tony Morgia

Tony Morgia began his portfolio management career in 1968 at Spencer Trask. He has a keen ability to look at the macroeconomic picture and relate it to the investment process. Mr. Morgia's success has come from the application of a long-term investment approach focusing on risk control and downside protection.



Michael Morgia, CIMA®

Managing Director, Partner

Michael Morgia began his career in 1988 with Smith Barney and is our lead equity portfolio manager. Mr. Morgia develops the algorithms and software programs for MWM's quantitative investment strategies and leads our internal trading and research desk.



PJ Banazek, CFP®

Managing Director, Partner

PJ Banazek began his career as a CPA for Firley, Moran, Freer and Eassa and later joined Morgan Stanley Smith Barney in 2000. Mr. Banazek specializes in managing fixed income portfolios and complex financial planning. He manages the analysis of estate planning issues, 401(k) plan design, tax-deferred savings opportunities, and stock options.

Our core values of disciplined and careful are more than just words. They guide us. In turn, they help us guide individuals, multiple generations of families, banks, unions, foundations, and retirement plans.

We are a fiduciary financial advisor, making us distinct from others. This completely optional obligation means we are bound to act in our clients' best interests, avoid any conflicts of interest, and provide complete information about any financial decisions we advise.

We believe this path represents the most responsible and safe course for our clients and their interests. We'd never advise you to do something with your money that we wouldn't do with our own.



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151 Mullin Street, Watertown NY 13601
315.222.7148 | morgiawm.com