

Jim Morris
VP, Institutional Retirement Plan Consulting | Retirement & Wealth
Marsh Agency

Jim Morris is a Vice President in Marsh Agency Retirement & Wealth, where he advises institutional retirement plan clients across the Washington, D.C. region and beyond. With more than 20 years of experience in the retirement consulting space, Jim has built his career helping organizations design, implement, and manage retirement programs that align fiduciary responsibility with stronger participant outcomes.

Since joining Marsh McLennan Agency in 2023, Jim has partnered closely with plan sponsors to deliver practical, high-touch consulting supported by the scale, resources, and multidisciplinary expertise of one of the market's leading retirement and wealth platforms. He works alongside recordkeepers, third-party administrators, investment managers, and other specialists to help clients navigate complexity and build retirement strategies that are both effective and sustainable.

Jim began his career at Merrill Lynch and later held leadership roles with MassMutual and United Bank Wealth Management before joining Marsh. This background has given him a broad perspective across the retirement landscape and a deep understanding of the issues facing plan sponsors today. He holds FINRA Series 7 and 66 licenses, as well as Life and Health licenses.

Jim is a graduate of Elon University and lives in Potomac, Maryland, with his wife, Tracy, and their children, Annie, Lucy, and John. A former PGA golf professional, he remains an avid golfer.

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Biography



John Doyle

John Doyle is a senior vice president and senior retirement strategist at Capital Group and American Funds. He has over 35 years of investment industry experience and joined Capital Group in 2013. Prior to joining Capital, John was a senior consultant with The BridgePoint Group, where he developed retirement plan solutions as well as product and service strategies. He also was executive vice president and chief marketing officer for Hartford Investment Management Company. Before that, he on the executive committee as head of marketing and product at T. Rowe Price Retirement Plan Services and as a vice president of marketing at Fidelity Investments. He holds an MBA from the F.W. Olin Graduate School of Business at Babson College and a bachelor's degree in economics from Georgetown University. John is based in New York and lives in Florida.