

***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.



As Capital Group's speaker on all things retirement, Jonathan Young believes six of the most powerful words in the English language are: Let me tell you a story. He weaves humor, statistics and insights drawn from over 35 years of investment industry experience to help coach financial professionals to retirement plan success.

"In my 20-plus years of attending wealth management and retirement plan conferences, I've heard many people speak. Few — if any — deliver the energy, knowledge and entertainment that Jonathan does. He's equal parts master storyteller and comic. Your brain and practice will benefit from attending his session(s)."

– Advisor of 20+ years

Jonathan's passion for the noble quest of improving participant outcomes is apparent to everyone who sees him speak. His mission is to show the vital role we can play as champions of dignified retirements for upcoming generations of Americans.

This former financial advisor knows the value financial professionals deliver to clients each day and always looks for ways to take practices to the next level. His decades of investment industry experience include more than 33 years at Capital Group\* as well as time spent at PaineWebber. He holds a bachelor's degree in speech communication and rhetoric from Old Dominion University.

This Virginia native can be spotted in his natural habitat of Chesapeake, Virginia, where he's known to indulge in his passions for classic muscle cars, classic vinyl, barbeque grillery and saltwater fishing.

"Jonathan cuts through the noise and delivers content that's relevant and meaningful. With wit and warmth, he creates an atmosphere that excites and engages the listeners."

– Advisor of 30+ years

Footnote/Important information:

\*Years of experience as of December 31, 2025.

**Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.**

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