The TRUE ADVISOR REPORT™

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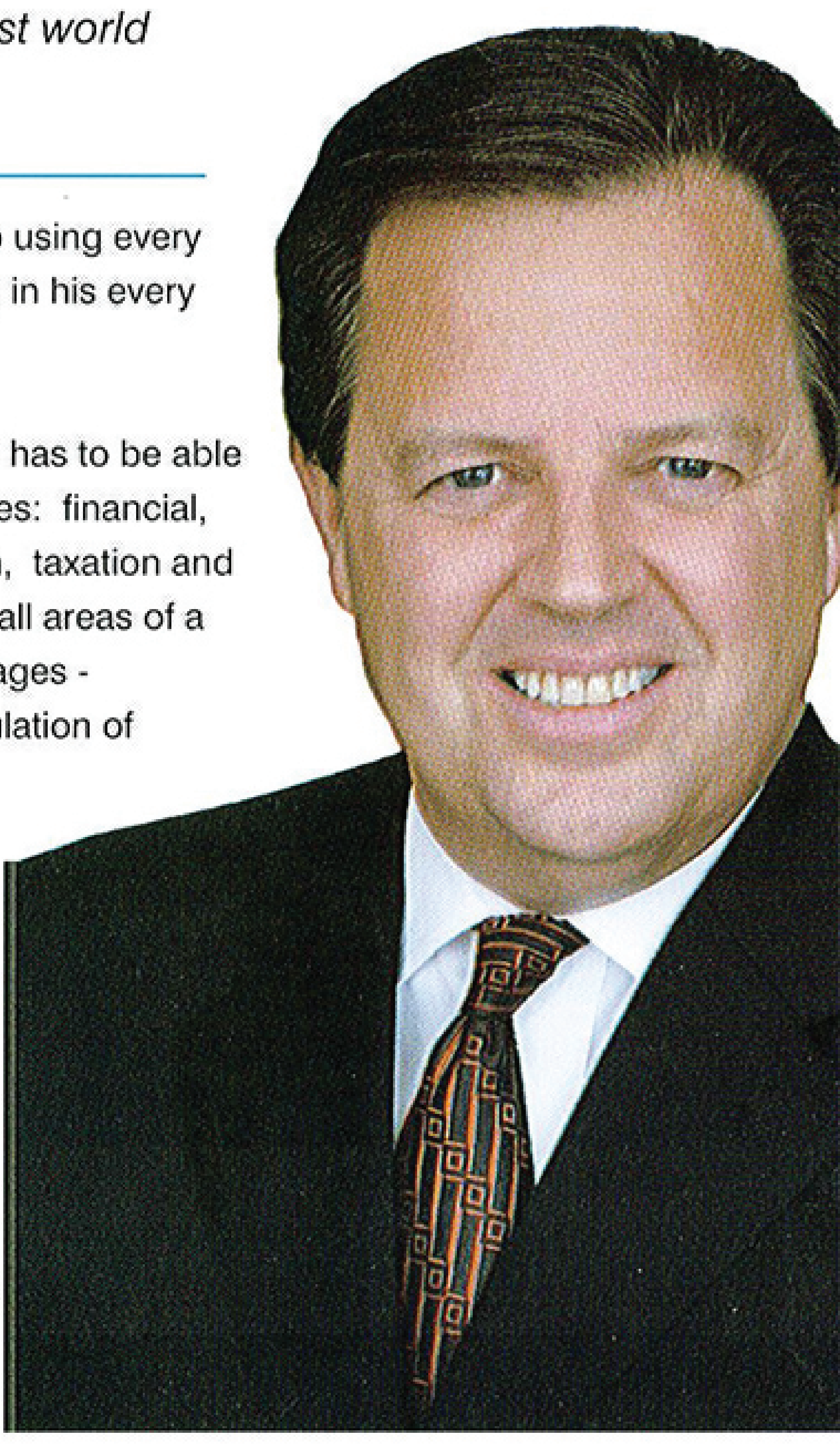
TRUE ADVISOR OF THE MONTH DAVID MORGAN

Your Mission, Not Your Commission

We all know that people take action from emotional responses. Sometimes these can be knee-jerk reactions or hasty decisions but often times these emotional responses are calls to action that leave the world a better place. The latter is the case with David Morgan, our latest world changing Super Star Advisor of the month.

"A true professional advisor has to be able to offer a full array of services."



Personal experience often drives financial advisors to help people. The chance to help someone else live a better life is a labor of love that only the best of the best truly understand. Morgan understands exactly that from an experience that hit close to home.

"After witnessing what my grandmother experienced in the mid-1980's in her financial disintegration with her stocks, then her spend down of many of her liquid assets once she became infirm, then the entire elongated probate process, I realized that there must be a better alternative to such erosion."

Morgan has all his bases covered, not only practicing business with diamond solid fundamentals but also using every aspect of financial planning in his every day work.

"A true professional advisor has to be able to offer a full array of services: financial, income, asset preservation, taxation and estate planning services in all areas of a person's and family's life stages - Before Retirement: Accumulation of wealth; Once Retired: Both preservation of that wealth and the effectual distribution of needed income; Once Deceased: Transfer of one's assets with the minimization of legal and taxation issues."

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YOUR MISSION, NOT YOUR COMMISSION

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We often hear success stories from our Super Star advisors but this month Morgan has offered us a rare glimpse of what his clients regard as success stories. These are actual quotes throughout the years from some of Morgan's clients:

"David, once we are deceased and in Heaven (I assume that is where we will be going!), you are the first person we will be smiling down upon because of the work that you and your firm did for us..." (2006)

"For the first time in our life, we are no longer losing money, even when the rest of our neighbors and friends were..." (2008)

"You are the first advisor we have met in the past 25 years who has made this whole Multi-Generational IRA and Retirement Trust truly understandable and we have attended lots of seminars!" (Yesterday, 2010!)

Morgan knows the value of good ethics. He chose to work with CRP because of like morals and diverse business options. "They were the first one to offer a truly wide and deep array of services to complement the full portfolio that I similarly offer to my clientele." When asked what advice Morgan would give to a newcomer in the business, his response is sage advice to all financial advisors: "One, make this profession your mission, not your commission; the depth and width of your convictions will manifest themselves to others when you do so. Two, conduct and character count, both your words and your convictions through conduct is how you are known to others." ■