# A&I FINANCIAL SERVICES LLC

Grow your wealth, protect your hard work and choose how you want to be taxed SM


**A&I Financial Services LLC**
9800 Mt. Pyramid Court, Suite 450
Englewood, CO 80112
303.690.5070 phone
720.259.6249 direct
303.699.8945 fax
www.AssetsandIncome.com


## J. Cameron Morgan, MBA, Financial Advisor


*Cameron@AssetsandIncome.com*


Cameron's career in financial services began in 1991 in Bangkok, Thailand, as an equity analyst for HSBC, one of the world's largest financial institutions. She progressed to an institutional equity sales role in London, U.K., where she advised portfolio managers for four years.

After completing an international MBA at the Daniels College of Business (University of Denver) in 2004, Cameron began advising business owners, individuals, and families who were serious about growing their wealth. A perfect career fit! She discovered a way to integrate her journalism training, stock market experience, and comprehensive business education for the benefit of families and entrepreneurs.

Cameron joined AIFS in 2007, and she thrives in our family-owned firm. She specializes in clients who have charitable giving and education funding goals, as well as retirement income planning needs. As a lifelong beneficiary of sound financial and estate planning, Cameron's work-related passions span financial literacy for youth, philanthropy, and inter-generational wealth transfer.

An avid skier who grew up in Colorado, Cameron also enjoys international travel with her Australian husband. She reads widely and spends time with her son and daughter, as well as their family's faith community.

Cameron is a member of the Colorado Planned Giving Roundtable and the Finance Committee of First Unitarian Society of Denver. She is on the Board of the Colorado Financial Planning Association. Cameron has participated in Junior Achievement and has written on financial literacy for Around the Corner magazine. In 2009, Cameron became a member of the Million Dollar Round Table.

*"My goal is to act as a conduit for my clients as they achieve financial independence. My particular passion is college funding, as I believe education is the key that turns almost every lock."*

### Licenses & Affiliations

Cameron earned a B.S. in Journalism from Northwestern University's Medill School of Journalism. Today, she holds FINRA Series 6, 7, and 66 licenses, as well as Series 63 license. She is an Investment Advisor Representative. Cameron maintains a Colorado life & health insurance license.