



FROM ADVICE TO EXECUTION.

MORR STRATEGY CREATES IMPACTFUL STRATEGIES TO ENVISION, DEVELOP, AND REALIZE TARGETED OUTCOMES.

PURPOSE

We are a goal-driven, action-oriented, and change-focused organization. We ask the tough questions. We encourage our clients to challenge us, and we invite productive dialogue. Our firm promotes the best interests of our clients, and we listen to our clients to create the most appropriate and innovative strategies and bespoke solutions for them. And with a philosophy grounded in client education, we work to make money more approachable, understandable, and effective for all.

Areas of specialization include: (1) Financial Education and Strategy; (2) Impact and Values-Based Investing Analysis and Due Diligence; and (3) Philanthropic Planning.

SOLUTIONS

1. Interactive Lecturing: Lunch and Learns, Virtual Lessons, One-on-One Development
 - a. Financial Basics: 10+ Basics to Financial Literacy
 - b. Financial Wellness: Bring EQ to an IQ World
 - c. Bridging the Gap Between Philanthropy and Investing
 - d. Angel Investing: Strategy and Due Diligence
 - e. Asset Allocation: How To, Goals and Outcomes
2. Muti-Series Learning Programming: Utilizing Interactive Lecturing Topics and/or Client Requested Topics
 - a. Faith-based Investing
 - b. Gender-focused Investing
3. Philanthropic and Investment Values Appraisal
 - a. Personal Development Sessions
 - b. Multi-Generational Dialogues

INVESTMENT

MORR Strategy seeks to provide the highest level of transparency and detail for all work engagements. To that end, prior to presenting an engagement proposal, MORR Strategy will invest the necessary time in meetings, dialogues, and other important activities to explore and understand the full scope of opportunities and challenges accruing to an engagement. Thereafter, MORR Strategy will present an engagement proposal with a singular fixed fee determined by, but not limited to, the client's entity status and lifecycle, the length and intensity of a project, and required resources. Upon request, MORR Strategy may provide an hourly project rate.