

David Morrison | Investment Representative



David has worked with investors for more than 20 years at trust departments, large banks and investment companies such as Merrill Lynch, Fidelity and Bank One. He joined Capital Consulting in 2004.

David advises clients on financial planning issues such as investment management, retirement planning, and trust and estate planning. David's mission is to help clients manage complex financial affairs through one trusted relationship. He accomplishes this by integrating all aspects of financial wellbeing, including investments, estate and trust issues, and financial planning. He is experienced at coordinating attorneys, accountants and other professionals to provide comprehensive solutions that go beyond investing.

A native Texan, David earned his bachelor's degree from the University of Texas. He also graduated from the ABA National Graduate Trust School and earned the Certified Trust and Financial Advisor designation in 1992. He is currently completing a Masters Degree in Financial Planning at the College for Financial Planning.

David has been married to Kay for 18 years. They have four children and live in Centennial. They enjoy serving in leadership roles at church and as community volunteers.