

LEADERSHIP IN ACTION

FPA members inspire others in many ways, helping lead in their practice, local Chapter, community, family, and especially with their clients. FPA Leadership in Action helps highlight these “everyday” qualities of our members and remind us that we all have opportunities to lead.



Gary Morris
Member since 1983

Morris Financial Services
Dallas, Texas

“Leadership is practiced not so much in words as in attitude and in actions. ☺☺

—Harold S. Geneen

THE BEST EXAMPLE OF LEADERSHIP IS LEADERSHIP BY EXAMPLE

A Leader in the Profession

For more than 30 years, Gary’s tireless efforts, passionate commitment, generous support, role modeling, and vocal and visible advocacy have made him a leader in many ways. He gives back to FPA at the local level as much as he gives back to the profession. For example, Gary has taught insurance, IMCA and CFP® ethics CE courses and donated the revenues back to his chapter, FPA of Dallas/Fort Worth. He has also directed giving through the Foundation for Financial Planning and has funded multiple merit scholarships to the chapter’s Career Development efforts. Additionally, he provided extensive pro bono work for evacuees of Hurricanes Katrina and Rita. Most recently, **Gary founded and currently chairs the Steering Committees of both the Greater Dallas and Greater Tarrant County Business Ethics Awards programs.**

“Gary is brilliant, hardworking and tenacious — a workhorse! He fills his excess time with professional endeavors and is faithfully involved in everything he does, always exemplifying the highest standards of professionalism, integrity and character. He is a quintessential leader and my mentor,” says a friend and former colleague.

Gary is consistently recognized as one of the best financial planners in both Dallas and the U.S., having earned several honors and awards.

Lessons Learned

- Continually learn, update and improve
- Ethics are the foundation of a strong business
- Serving others is the best reward

Gary’s Leadership Portfolio

Gary was a 2006 recipient of FPA’s prestigious Heart of Financial Planning Award. He previously served as president of the Dallas Society of the Institute of Certified Financial Planners — FPA’s predecessor organization. He is a Registered Investment Adviser with the Securities and Exchange Commission. Additionally, he’s a CERTIFIED FINANCIAL PLANNER™ professional, a Fellow of the Life Management Institute, a Chartered Life Underwriter, an Accredited Estate Planner, a Certified Investment Management Consultant and an Accredited Investment Fiduciary. Gary also serves in a leadership role on many local boards, including the North Texas Ethics Association, Parkland Foundation Planned Giving Council and the Consumer Credit Counseling Service of Greater Dallas. He is a member of the Ethics & Compliance Officer Association and the Institute for Global Ethics. Gary holds a bachelor’s degree from Union College and an M.B.A. from the University of Hartford.