

# How Do You Respond to Leadership Challenges?



## LUNCHEON

CBMC Downtown Baltimore  
Presents

**James G. Morgan, Jr., CLU, RHU**  
Founding Partner  
Heritage Financial Consultants, LLC



Jim will share leadership insights, life challenges and his personal faith journey.

**Christian Business Men's Connection**



James G. Morgan Jr., the founding partner of Heritage Financial Consultants, has been involved in the insurance and financial services industry since 1960. He specializes in working with high net worth individuals on their financial planning, estate planning and philanthropic planning.

Jim joined Lincoln National Life Insurance Company in 1969. He was named President of its Baltimore agency in 1978 and CEO in 1983. Under his leadership, the agency was the largest life insurance agency in Maryland and one of the largest in the United States. In April 1997, Jim retired as CEO of Lincoln National Life Baltimore office.

A native Baltimorean, Jim and his wife devote much of their time to speaking around the country about training and educating children with learning disabilities. In 1993, they set up the Morgan Family Foundation primarily for use in making charitable contributions to many organizations. With the passion of helping students who struggle with Dyslexia, Jim has served as Past President of the Dyslexia Tutoring Program, and helped start the Odyssey, Highlands, and Summit Schools which specialize in learning disabilities. He serves on the Advisory Board of Calvert Hall College and started the Lasalle Program for college bound students with learning disabilities and serves as a Life Trustee of Jemicy School.

Jim has been inducted into the University of Baltimore's Athletic Hall of Fame and Calvert Hall's Hall of Fame. He has received a Bachelor of Science in business administration from the University of Baltimore and received the University of Baltimore's Entrepreneur of the Year Award. Jim enjoys the game of golf. He and his wife have four children and ten grandchildren and reside in Lutherville, Maryland.

*Come and bring a friend!*

**Date & Time:** Friday, October 12, 2018  
Networking 11:30 AM  
Luncheon 12 Noon to 1:00 PM

**Place:** World Relief  
7 East Baltimore Street  
Baltimore, Maryland 21202

**Cost:** \$15.00 Please Register  
and pay online at [www.cbmc.com/events](http://www.cbmc.com/events)

Questions? Call or email: Chuck Brooks  
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