



Goldstein Advisors
2501 Parmenter Street, Suite 100A
Middleton, WI 53562-2673

Office: 608.831.3230
Toll Free: 877.640.6894
Fax: 608.831.3235

morgan.walsh@goldsteinadvisors.com

Morgan Walsh

Client Service Specialist

Morgan joined Goldstein Advisors in 2020 as a client service specialist. Her daily responsibilities include assisting the firm's financial advisors with obtaining information, preparing for meetings, performing a variety of administrative duties, and providing an exceptional experience with every client interaction.

Her passion to learn and serve has led her to enter a rewarding career in the financial services industry. She always strives for impactful and effective outcomes that support her team and the client experience. Morgan plans on expanding her knowledge through additional learning opportunities and attainment of professional designations in the future.

In her spare time, Morgan enjoys teaching cello lessons, traveling, spending time with family and friends, and hiking with her Bernese mountain dog. She successfully summited Long's Peak in Rocky Mountain National Park and looks forward to conquering more Colorado 14ers.

EDUCATION

» Grand Valley State University – Bachelor of Music



**GOLDSTEIN
ADVISORS**

GoldsteinAdvisors.com

CA Insurance License #0G70873. Financial Advisors offer advisory services through Arbor Point Advisors, LLC. Registered Representatives offer securities through Securities America, Inc., Member FINRA/SIPC. Goldstein Advisors, Arbor Point Advisors, and Securities America are separate companies. Securities America and its representatives do not provide tax or legal advice; seek a qualified professional.