

## **Mti Financial Advisors Celebrates 30-year Anniversary. Grows Assets Under Management to \$225 Million**

*MTI Financial Advisors is celebrating its 30-year anniversary as a leading independent financial planning and investment management firm based in Edina, Minnesota. Working with clients throughout the U.S., MTI Financial Advisors provides retirement accumulation and income planning, investment management as well as estate, trust and tax planning services.*

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MTI Financial Advisors Celebrates 30-Year Anniversary

Grows Assets Under Management to \$225 Million

MTI Financial Advisors is celebrating its 30-year anniversary as a leading independent financial planning and investment management firm based in Edina, Minnesota. Privately owned, the firm was founded in 1988 by Financial Advisor Douglas Morey.

Working with clients throughout the U.S., MTI Financial Advisors provides retirement accumulation and income planning, investment management as well as estate, trust and tax planning services.

“I’m proud of our firm’s 30-year milestone,” said Morey. “This achievement is a testament to our stability, client dependability and capacity to navigate financial market volatility. Also, our staff turnover is remarkably low. One of my colleagues has been with the firm since 1991, and the other since 2002. Our high staff retention rate means we’re doing things right.”

The MTI Financial Advisors three-advisor team has more than 100 years of combined financial services experience.

In the Best Interests of Clients

“I founded MTI Financial Advisors to have the freedom to provide independent and unbiased financial advice to my clients,” said Morey. “My goal was to eliminate the pressure to sell products or to meet the sales quotas often imposed by large financial corporations.”

Instead, MTI Financial Advisors affiliated with Investacorp, Inc., a boutique independent advisory and brokerage firm that provides an integrated and secure digital platform enabling more than 500 independent financial advisors to provide investment solutions and wealth management advice to individuals, families, businesses and institutions.

Morey has been a member of Investacorp’s Leaders Forum for the past five years. At this invitation-only event, the top 40 influential financial advisors affiliated with Investacorp come together to share ideas, best practices, technology advancements and industry trends.

“Doug has been affiliated with Investacorp since 1989,” said Patrick Farrell, President and CEO of

Investacorp. “It’s been a privilege to work alongside him for almost three decades and experience his unwavering commitment to providing comprehensive financial advice and outstanding client service. Doug’s desire to operate an independent financial practice at the highest level is a key factor in our continued relationship, since Investacorp is committed to providing a sophisticated financial toolkit that helps our advisors remain competitive and distinct.”

### Looking Forward

“While some financial practices are contracting, our continued focus is providing exceptional client service, which in turn, creates organic growth,” said Morey. “Our team’s client-centric approach is ultimately what has led to our firm’s longevity and financial depth.”

To contact Douglas Morey, please call 952-835-7445, ext. 71, email him at [dmorey@mtifinancial.com](mailto:dmorey@mtifinancial.com) or visit [www.mtifinancial.com](http://www.mtifinancial.com) for more information.

### About MTI Financial Advisors

MTI Financial Advisors is a wealth management and retirement planning firm with approximately \$225 million in assets under management. The financial advice team includes three industry veteran advisors, including Founder and President Douglas Morey, Financial Executive James Bayliss and CERTIFIED FINANCIAL PLANNER™ Professional Mark Engblom, CFP®. The firm’s client base is largely comprised of small business owners, executives and retirees averaging \$500,000 in investable assets. Other clients include mid-size companies requiring service for employer-sponsored retirement plans. MTI Financial Advisors is located at 7300 Metro Blvd, Suite 200 in Edina, Minnesota. For more information, please call 952-835-7445 or visit [www.mtifinancial.com](http://www.mtifinancial.com).

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