



Professional Profiles

Richard C. Morrow, CFP®, CPA Senior Financial Advisor, Principal



Rich is a Principal and Senior Financial Advisor in the Boardman, Ohio office of HBK Sorce Financial LLC (HBK Sorce). He has extensive experience in comprehensive financial planning, estates and trusts, income tax, retirement planning and asset management services. Rich serves a variety of clients from individuals to various business entities.

Rich began his public accounting career in 1991, joined HBK in 1994 and then joined HBK Sorce in 2000.

Education

- BA Degree in Accounting and Pre-Law, Ohio University
- CERTIFIED FINANCIAL PLANNER™ Certification
- Certified Public Accountant (CPA)
- FINRA Series 7 and 66 Licenses

Professional/Civic Associations

- Member, American Institute of Certified Public Accountants (AICPA)
- Member, Ohio Society of Certified Public Accountants (OSCPA)
- Member, Financial Planning Association (FPA)
- Treasurer, Covenant Christian Church
- Treasurer, Salvation Army

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