

John R. Morris

John Morris is responsible for providing individual investors and investment advisors with access to a broad array of asset management products and services. Morris' team develops and maintains platforms for investment products, including mutual funds, separately managed accounts, alternative investments, insurance and annuities.

Previously, Morris served as Schwab's senior vice president of managed accounts. He was responsible for the development of Managed Account Select® and Managed Account Access™, two platforms designed to offer managed accounts at lower costs and with streamlined administration. Morris also helped expand Schwab's open architecture platform for independent investment advisors, Managed Account Marketplace®.

Morris has held several positions with Schwab, including vice president of mutual fund relations and vice president for mutual fund institutional services where he led the product development of mutual fund clearing services. He has also held the positions of director of mutual fund trading and branch manager.

He earned his Bachelor of Arts degree in economics from Allegheny College in Meadville, Pennsylvania and his Master of Business Administration degree from the University of San Francisco. He is a member of the board of governors for the Money Management Institute and a member of the Investment Management Consultants Association.