Wealth Advisor
Advisory Team Leader

William Morgan, CPA/PFS

While working as a CPA, Bill Morgan continually saw clients get investment advice that failed to benefit them from a tax perspective and, in some cases, was precisely the opposite of what would further their financial security. He also saw a need for comprehensive and evidence-based wealth management with a tax-centric approach. So he took a leap and entered the realm of financial planning. Now, in conjunction with his clients' CPA and estate planning attorney, he's part of a team that provides proactive counsel that truly benefits clients.

As a wealth advisor, Bill helps clients build and implement a holistic financial plan engineered for their specific financial situation. He works with a team of other professionals to monitor, update and execute wealth management strategies in pursuit of his clients' wealth transfer, retirement and tax objectives.

For Bill, the most rewarding aspect of working with clients is easing clients' worry of financial decision-making so they can enjoy the best times in life and achieve their financial goals. That starts by leveraging his experience in individual taxation, using the information gathered at each visit to provide tax planning suggestions, which in turn offers a very positive tangible result: lower taxes.

Bill served as president of Herbein Wealth Management, which is based in the Wyomissing, Pennsylvania, until the firm's merger with Buckingham Strategic Wealth in 2016. Before founding Herbein Wealth Management in 2000, Bill spent more than two decades as a practicing CPA with Herbein + Company Inc. For 15 of those years, he was the partner in charge of the firm's tax department.

A graduate of Susquehanna University, Bill earned his bachelor's degree in accounting in 1976. He also holds the CPA/PFS professional designations.

Outside of work, Bill enjoys playing golf and personal fitness (the need for the later benefits the former, as he likes to say). Interestingly, his two favorite parts of the day involve meetings. The first is at the gym, working with his personal trainer to stay healthy; the second is when he sits down with clients to build and maintain their financial health and wellbeing. Bill has also been an avid wine collector for many years and explored wine regions in France, Spain and California.

Bill has been a member of the Berks County Estate Planning Council since 1981 and in the past served as its president. He is also a past president and a past member of the board of directors for Berkshire County Club. A native of Honesdale, Pennsylvania, Bill now lives in Sinking Spring, a suburb of nearby Reading. He has two adult daughters.

Professional Designations

- CERTIFIED PUBLIC ACCOUNTANT
- PERSONAL FINANCIAL SPECIALIST

Contact William

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