

Keith Morgan

Senior Vice President-Investments



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Keith Morgan is an advisor for families, individuals, and small business owners. He works closely with his clients and provides a thoughtful, personalized approach to planning their investment strategies and retirement plans.

Keith began his financial career with Smith Barney in 1998 as a Financial Consultant. Prior to joining Umpqua Investments, Keith was a Vice President-Investments with UBS Financial Services in Lake Oswego, Oregon. After working at two large firms he decided to move his practice to a smaller, regional firm where clients are treated like people and not numbers. Keith maintains his FINRA Series 7, 9, 10, 31, 63 and 65 licenses.

Keith was born in Madera, California to entrepreneurial parents who instilled the value of personal relationships in business. He graduated from California State University, Fresno with a Bachelor of Science in Marketing.

Keith was a decorated Naval Flight Officer on active duty for ten years and spent five years in the reserves as a Lieutenant Commander. He was a mission commander in the P-3C Orion aircraft and served in the Gulf War during Operation Southern Watch.

Keith and his college sweetheart have been happily married for over 27 years and have two grown sons. His leisure pursuits include spending time with family and friends and enjoying the great outdoors.

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