

Yana Morgan, CFP®



Regional Director

In her role as regional director at Weitz Investment Management, Yana has many opportunities to work with both current and prospective clients through several of the firm's distribution channels. She is also responsible for maintaining the firm's institutional account financial reporting and communication functions. Before joining the company in 2000 as a client services representative, Yana was director of donor services for the Omaha Community Foundation. She also has a background in politics. She served in Washington, D.C. as a legislative assistant for U.S. Sen. Chuck Hagel and spent several years managing and fundraising for various Nebraska campaigns. Yana has a bachelor's in psychology from Southern Connecticut State University. She holds Series 7, 6 and 63 licenses and is also a Certified Financial Planner.

About Weitz Investment Management

Founded by value investor Wally Weitz in 1983, Weitz Investment Management, Inc. is a boutique, employee-owned asset management firm headquartered in Omaha, Nebraska.

Over the past three decades, Weitz has leveraged its research-driven approach to capitalize on opportunities that arise out of market inefficiencies. Decisions are backed by thorough research, logical strategies, extensive debate and our team's personal commitment to long-term results.

The Weitz team builds and manages concentrated, high-conviction, actively managed portfolios. Through bottom-up, proprietary research that emphasizes fundamentals, we focus on creating positive results over the long term. We offer a variety of options for investors with different goals and preferences, including equity and fixed income investment strategies.
