WHAT WE DO

WE ADDRESS 10 CRITICAL WEALTH MANAGEMENT CONCEPTS.

1. Family Financial Overview
2. Planning & Cash Flow Modeling
3. Wealth & Investment Management
4. Liability Management
5. Retirement Plans & Company Benefits
6. Retirement Income Planning
7. Insurance & Asset Protection
8. Estate Planning Strategies
9. Business Succession
10. Coordination with CPA & Attorney

Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies. The Jackson Wealth Management Group of Wells Fargo Advisors, and its affiliates are not legal or tax advisors.

OUR ETHICAL COMMITMENT

WE ENDEAVOR TO:

- Adhere to the highest level of duty and loyalty to our clients always acting in good faith and putting their interests ahead of all.
- Operate our business according to the highest standards of professionalism in the industry.
- Clearly explain strategies, features, realistic returns and risks that may affect the performance and values of what we may recommend.
- Strive to make recommendations that carefully balance current and future needs, so there is not undue sacrifice or risk.
- Make every effort to help protect client assets from fraud and keep client information private.
- Provide concise, informative, clear and consistent communications with every client.
- Refer clients to a more specialized professional advisor when their needs go beyond our current experience or registrations.

OUR COMMITMENT TO CLIENT SERVICE

- Customized FACE-TO-FACE or VIRTUAL MEETINGS as needed to discuss comprehensive planning needs-goals
- JOINT MEETING(S) with your accountant(s) or attorney(s).
- Scheduled CALLS from your advisors and your support team.
- Us to be there as a SOUNDING BOARD or second opinion for friends and loved ones.
- INVESTMENT ADVICE that is independent, objective and unbiased.
- Creative and consistent client COMMUNICATION OFFERINGS delivered electronically, or through social media.
- Invitations to PRIVATE CLIENT EVENTS that are designed to enlighten and/or entertain.
- PERSONAL ATTENTION and sincere care.