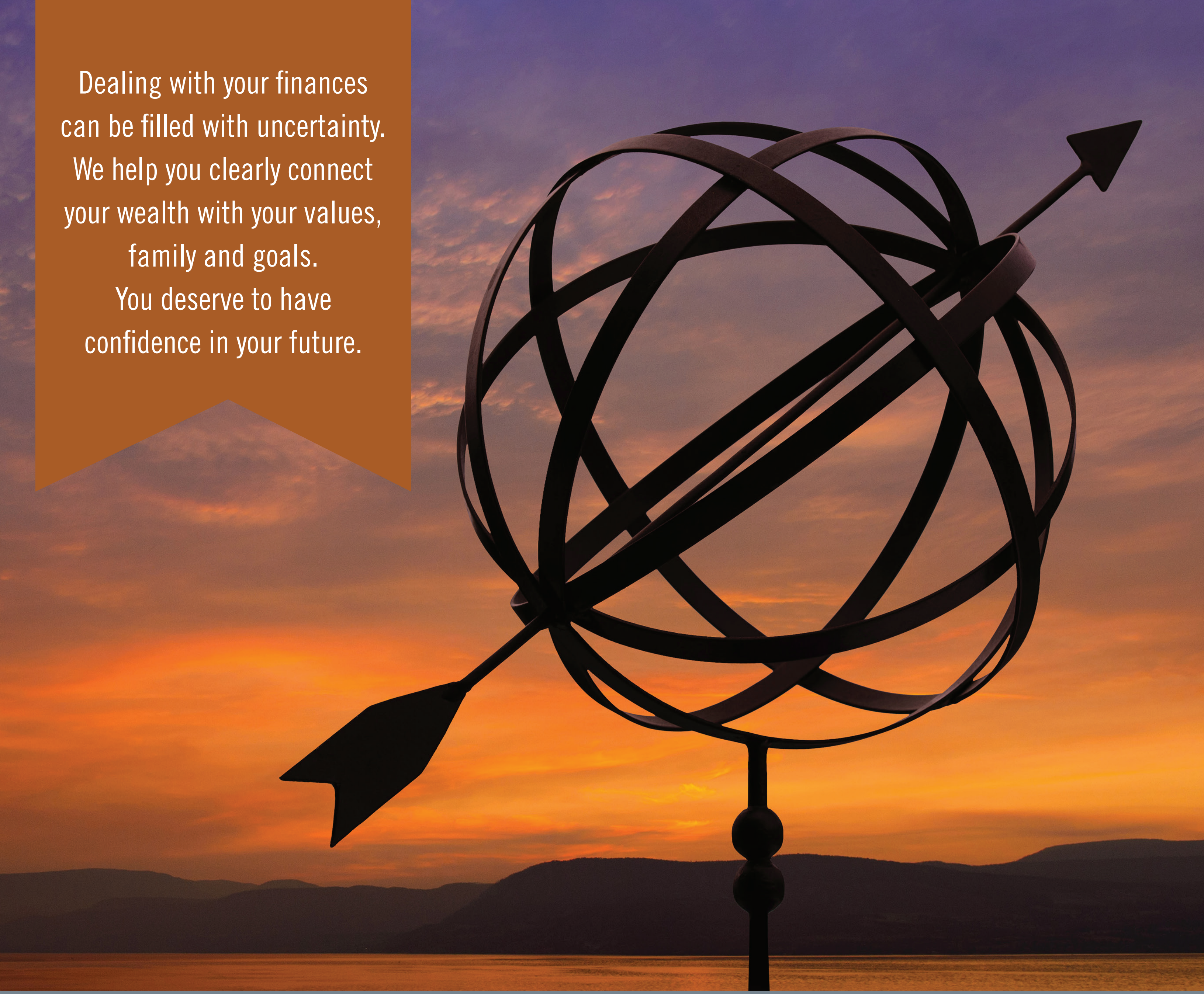

Dealing with your finances can be filled with uncertainty. We help you clearly connect your wealth with your values, family and goals. You deserve to have confidence in your future.

THE JACKSON WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors

www.thejacksonwmg.com

Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

OUR MISSION is to enhance the quality of our clients' lives and bring prosperity and blessings to those we serve.

The **JACKSON WEALTH MANAGEMENT GROUP OF WELLS FARGO ADVISORS** has over 55 years of combined experience as a trusted advisor to a select number of families and institutions. We are committed to helping you plan effectively, invest wisely and map a realistic course for your future years.

WE HELP CLIENTS ACHIEVE:

CLARITY is getting your arms around all your financial affairs. It is also the capacity to see your situation in fresh and revealing ways and to identify issues often overlooked.

CONFIDENCE is knowing that you have a plan in place and that you are on track to realizing your life's goals.

STRUCTURE is having your financial affairs thoughtfully and thoroughly organized, guided by a highly-trained and qualified team of experts.

DO YOU HAVE ANY FINANCIAL BLIND SPOTS?

MEET THE TEAM

WHEN YOU BECOME A CLIENT, YOU BECOME A PART OF OUR WORK FAMILY.

RICHARD W. JACKSON, CFP®

Managing Director – Investments
562-493-7625
richard.w.jackson@wellsfargoadvisors.com

Richard is a CERTIFIED FINANCIAL PLANNER™ Professional who began his career as a Financial Advisor in 1988 and joined Wells Fargo Advisors in 1995. Richard is a longstanding member of Wells Fargo Advisors Platinum Council, from 2005-2023, The Platinum Council (previously known as Premier Advisor) distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by completion of educational components, business production based on the past year, and professionalism. Additional criteria, best practices and team structure, may also be used to determine recipients.

Richard was born in Glasgow, Scotland and moved to California in 1968. He earned his bachelor's degree from California State University, Long Beach in 1985 and has served on the University's Athletic Advisory board. A strong believer in community service Richard has served on numerous non-profit boards in both Los Angeles and Orange County and is still active in several local non-profit groups.

Richard and his wife reside in Huntington Beach. They have three grown children who live in Southern CA and Denver area.
CA Insurance License # 0698565. Resident State: CA

TINA HARMIER

Senior Registered Client Associate, Assistant Vice President
562-493-7659
tina.harmier@wellsfargoadvisors.com

Tina is a registered Senior Registered Client Associate for the Jackson Wealth Management Group of Wells Fargo Advisors. She began her career in the financial services industry in 1985 and joined Richard in 1990. Her administrative experience is critical in helping our clients resolve all administrative requests in a timely and professional manner.
CA Insurance License # 0D10391. Resident State: CA

CINDY DIEP TANG

Financial Consultant
562-493-7615
cindy.diep@wellsfargoadvisors.com

As a Financial Consultant, Cindy is dedicated to managing client relationships and providing comprehensive and strategic planning. Cindy has over 20 years of financial industry experience that started with retail banking. She currently holds her FINRA Series 7, Series 66 registrations and California Life Insurance license.

Cindy earned her Bachelor's degree in Business Finance from California State University, Fullerton. She has worked in the Seal Beach community for the past 15 years and is currently involved in the Seal Beach Chamber of Commerce. Outside of the office, Cindy enjoys running and playing tennis. As a family, Cindy and her husband love to travel and would like to continue to take their daughter on as many adventures as they can.
CA Insurance License #0E65981. Resident State: CA

TREVOR JACKSON

Financial Advisor
562-594-1428
trevor.jackson@wellsfargoadvisors.com

Trevor started in the Financial industry in 2016, working as an intern for Scottrade in Boulder CO, while completing his senior year at University of Colorado. In 2019 he earned a certificate in Business Management from Durham University-England, Business School. In June of 2019 Trevor moved back to Denver, CO to work for Charles Schwab & Co, Inc. During his two year tenure, he became Series 7 registered, and was promoted to their Trading Desk. Trevor joined Wells Fargo Advisors in July 2021.

While in U.K from 2017-19 Trevor also played for the Scotland National Men's Field Lacrosse Team, and competed in 2018 World Championships in Israel. He also competed for Scotland's Men's Indoor Lacrosse Team at the World Championships in Vancouver, Canada in 2019. Trevor enjoys, hiking, surfing, snowboarding and traveling in addition to his passion for Lacrosse.
CA Insurance License #415977. Resident State: CA

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

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.

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 PROCESS

WE BEGIN BY LISTENING TO YOU

We bring our collective education and experience to each client relationship. We direct our energy, passion and expertise to the process of helping our clients succeed personally and financially.

Getting To Know You

Comprehensive Financial Overview

Analysis and Plan

Advice and Implementation

Review & Evaluate

Personalized Service and Reviews

WE HARNESS THE VAST RESOURCES OF WELLS FARGO ADVISORS

We provide access to the services, resources, and strength of Wells Fargo Advisors. We are supported by an outstanding team of estate planning specialists, tax planning specialists and insurance specialists, increasing the breadth of knowledge we provide clients[1].

CREATING RETIREMENT INCOME

We help clients make CRITICAL DECISIONS, such as those relating to Retirement Income Planning, Social Security, Medicare, and Estate Planning strategies.

Determine Desired Lifestyle Spending

Evaluate Resources and Cash Flows

Determine Sustainability of Income

Illustrate Proposed Withdrawal Strategy

Transfer Interest and Dividends

Adjust and Evolve

CREATING & MANAGING AN INCOME STRATEGY

We help clients account for CRITICAL RISKS like longevity, inflation, taxes, market disruptions and increasing health care costs.

CUSTOMIZED PORTFOLIOS

STRIKE THE PROPER BALANCE

Diversification[2] — spreading your assets among investment types, styles, and markets is a sound strategy for investors with long-term financial goals.

RESIST THE URGE

When tempted by current market conditions we counsel clients to stay true to their long-term plan. The buzz in the investment markets never stops, but desire and impulse are never good substitutes for rational thought and a disciplined approach.

WE BELIEVE...

- In putting clients first, all the time.
- Everyone has goals and needs a plan.
- The true enemies of wealth are taxes, inflation and human emotion.
- Complexity should be avoided.
- We can help minimize debt and manage it prudently.
- Successful investing employs patience and discipline.
- In diversifing to help minimize losses in down markets. Good decisions arise from facts, numbers, experience and values.
- Risks should be clearly understood and communicated.
- Costs should be fully disclosed and value delivered.
- The media amplifies emotion and volatility in the markets.
- Disaster, bad news, and fear often create bargains.
- If it sounds too good to be true, it usually is.
- To remember where it came from.

1 Wells Fargo Advisors is not a tax or legal advisor. However, we will be glad to work with you, your accountant, tax advisor and or lawyer to help you meet your financial goals. Insurance products offered through affiliates.

2 Diversification does not ensure a profit or protect against a loss in a down market. Dividends are subject to change or elimination and are not guaranteed. Your actual portfolio allocation will differ from this illustration based on investment objective and suitability.

NOTES

THE JACKSON WEALTH MANAGEMENT GROUP of Wells Fargo Advisors

3020 Old Ranch Parkway, Suite 190
Seal Beach, CA 90740

Phone: 562-493-7659 Toll Free: 800-367-2347
www.thejacksonwmg.com

ENTERTAINING AND ENLIGHTENING CLIENTS

EVENTS

We host various client events designed to both enlighten and entertain.

COMMUNICATIONS

Our periodic digital communications provide a variety of insight on finance, health, life and politics.

WHAT WE'RE READING AND WATCHING

An interesting assortment of articles and links to videos designed to stimulate your mind and sharpen your perspective are available on our website: www.thejacksonwmg.com