

Top 25 Reasons to Choose Jackson Wealth Management, LLC

1. **Personalization** - When we develop a financial plan, including an investment plan, we dig deep to understand the client's individual needs, wants, goals and timetables.
2. **Empathy** - We truly listen to our clients, ensuring that the client feels understood. We demonstrate that WE CARE. Other financial advisors may have an agenda of selling products and do not sincerely listen to their clients.
3. **Knowledge** - Our Founder and active Chief Executive Officer/Chief Investment Officer, George P. Jackson, MBA, CPA, CFA®, CFP®, CMT®, CLU®, ChFC® is a credentialed investment advisor.
4. **One of the Best.** George Jackson has been listed as one of the best wealth advisors across the country by Forbes in both 2018 and 2019. George has been recognized as one of the premier financial advisors in Central Florida by the Wall Street Journal in 2016. He was named to Registered Rep.'s list of "America's Top 100 Independent Financial Advisors," published August 1, 2008 and August 1, 2010. There are approximately 122,000 independent financial advisors in the United States. In 2013 Jackson Wealth Management was listed as "Top 25 Financial Planning Firms" by the Orlando Business Journal.
5. **Fiduciary vs. Suitability: What's The Difference?** - We have a fiduciary responsibility to our clients. We must, by law, do what is in the best interest of our clients. This is enforced by the Securities and Exchange Commission. The DOL Fiduciary Rule, effective June 9, 2017, requires all advisors of retirement plans and Individual Retirement Accounts (IRAs) to be fiduciaries. Our firm is also a fiduciary for non-retirement accounts. Other advisors may only have a "suitability" standard for non-retirement accounts.
6. **Trust and Integrity** - We are the true trusted advisor whom everyone is looking for. All of our investment advisors, including our founder, have squeaky clean compliance records, with ZERO disclosures for customer complaints. We take this incredibly serious, a high level of trust is what our firm is built on. You can research any advisor in the US: <https://brokercheck.finra.org/>
7. **Next Generation Investment Management** - We deploy sophisticated algorithms daily, not only to monitor all of our current holdings in all of our model portfolios for sell signals, but also to search the universe of possible constituents of our model portfolios for companies we want to own. We use two (2) separate trading software platforms executed by two separate team members to run these scans every day which are then provided to the Chief Investment Officer for review.
8. **Wealth Preservation/Risk Management** - Our philosophy is that cash flow is king. To preserve cash flow, you must preserve capital. Lose your capital, your cash flow will suffer. For the period October 1, 2007 through February 28, 2009 the S&P 500 index with dividends declined -50.04%, our actual dollar-weighted cumulative return during that period for all of our managed accounts was a decline of -8.53%, net of fees. Our tactical, trend following approach saved our clients from a lot of financial heartache. Contact us to receive the independent CPA verified Global Investment Performance Standards report that verifies the actual -8.53% decline, net of fees. Past performance is no guarantee of future results. Other advisors told their clients "stay the course" or "buy-and-hope."
9. **Longevity** - We are celebrating our 25th year in business. Our predecessor and current firm have been operating continuously since June 1992 with George Jackson as Chief Investment Officer.
10. **Team Approach** - Our in-house team, coupled with our many external independent strategic partner firms, allow us to deliver world class solutions to client problems and issues, no matter how sophisticated. We partner with tax & estate planning attorneys, independent insurance agents, independent investment research firms (one research firm alone has 100 analysts on staff, many who are CFAs), compliance firms, and CPAs to help our clients reach their financial goals.
11. **Long-term Relationships** - We want a long-term relationship with our clients. It takes time to really get to know our clients and truly understand their risk tolerance, wants, needs and goals.
12. **One-Stop Shop** - You can ask our firm any question about money and we will get an answer for you. Have a tax question? Estate planning question? Education planning question? Social security optimization question? Retirement question? Insurance question? Investment question? We are happy to help. Other firms only provide investment advice and will often say things like "I am sorry, contact your tax advisor, we cannot give tax advice."
13. **Investment "Watchdog" Service** - We review each model portfolio on a daily basis objectively monitoring each individual investment. We provide our clients with independent advice and investment performance evaluations. We provide retirement plans and 401(k) recommendations, striving to provide our clients the best investment management service in the industry.

14. **Tax Reduction Planning** - The JWM tax professionals offer comprehensive reviews of tax returns to maximize your tax reduction strategies. We provide a complimentary consultation with our clients' individual tax preparer. As an advisor we look at our clients' finances as a whole with the goal to ensure they are coordinated in their best interest.
15. **Retirement Income & Distribution Planning** - As part of the retirement plan we provide our clients, we focus on income needs now and in the future. Proper planning of tax efficient retirement distributions are essential to maximizing long run returns and wealth. We help complete the necessary paperwork to designate beneficiaries of accounts and lift the burden on the client.
16. **Family Wealth Planning** - The JWM team of professionals provides necessary financial guidance to the families of loved ones in the event of a death. We settle estates and oversee the transfer of assets as a complimentary service to our clients. We review your long-term care needs and beneficiary designations. Estate planning is best done by an advisor who has developed a long-term relationship and has built a lifetime of trust.
17. **Education** - We explain in simple everyday language financial planning choices with pros and cons for each choice, with the goal that our clients can make well-informed decisions.
18. **Fairness to all Clients** - We manage client accounts through the use of "model portfolios." With model portfolios, by law, all clients receive the same price, on the same day, at the same time for trade execution. We cannot, by law, favor our golfing or tennis buddies. Other advisors use "custom portfolios" such that every client has a different portfolio. This is virtually impossible to manage and monitor on a daily basis, especially when a crisis happens, like 9/11, the tech bubble or when a real estate bubble bursts.
19. **Retirement Income** - We are professionals at 401(k) rollovers and the complexity of tax planning, like Net Unrealized Appreciation of employer securities. We offer three (3) distinct dividend oriented model portfolios, each with a specific strategy. Dividend growth, high current dividend yield and essential services. Our retirees love these model portfolios. Every company in the portfolios pay a dividend, many of the companies have increased their dividends every year for the past 20+ years. This could be a good retirement portfolio, cash flow payments with potential raises every year.
20. **Superior Communication** - We offer periodic market opinions through emails; these emails are highly valued by clients, since they take a different approach from the norm. We email informative newsletters monthly to our clients. We provide quarterly reviews of our clients' accounts with performance reporting along with an update on clients' goals progress.
21. **Educational Events and Client Appreciation Events** - Our clients are like family and we offer periodic events to educate and entertain our clients.
22. **Value and Momentum** - For our five (5) individual stock model portfolios we use a value (we like to buy companies at or below fair value) and momentum (a/k/a trend following, a/k/a relative strength). Both Value and Momentum have extensive academic research supporting these methodologies as being significant for superior investment performance.
23. **Free Aggregation Software** - Our clients love this service! Our clients link their brokerage accounts, mutual fund accounts, 401(k) or tax deferred annuity accounts, bank accounts, credit cards, mortgages, HELOCs, and/or real estate values all in one online account. This provides the client and us (their advisors) with a net worth statement, updated daily, which helps us develop financial plans more quickly and update those plans more frequently. In addition, a secure vault allows our firm to deliver performance and other reports to clients in a secure way. Our clients also store their important documents in the vault, like wills and trusts, driver's licenses, passports, deeds, and/or promissory notes that are accessible 24/7 via cloud storage.
24. **Free Income Tax Planning** - Nothing else has the potential to cost you more of your hard earned money than unnecessary taxes. At Jackson Wealth Management we have the knowledge and experience to work with you to make sure that you pay as little tax as legally possible. Worried about what the tax impact will be on the sale of your rental property, or the sale of an appreciated stock, or any other taxable event? No worries, we will provide you with free income tax planning.
25. **Privacy.** To ensure the best results from your financial planning relationship, you will need to divulge sensitive personal information to your advisor. We are required to keep this information in confidence. We never overlook the importance of our clients' personal information, we go out of our way to guarantee the significance of clients' privacy. We provide our clients with a copy of our written privacy policy.



Complimentary Financial Check-up

If you are currently not a client of Jackson Wealth Management, we would like to offer you a complimentary, one-hour, private consultation with one of our professionals at absolutely no cost or obligation to you. To schedule your financial check-up, please call **Matt at 321-249-6670** and we'd be happy to assist you.