

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, taking the time to fully understand their unique needs, goals, and concerns. Our approach is centered on building genuine relationships and showing that we care, providing thoughtful guidance that reflects each client's individual circumstances.
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 P. Jackson was named to Forbes' "Best-in-State Wealth Advisors" 2018, 2019, 2020, 2021, 2022 and 2023 list out of over 300,000 advisors. The Ranking is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings.
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.
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 simple: *cash flow is king*. Preserving long-term cash flow requires careful attention to capital preservation. That's why our approach emphasizes proactive risk management and disciplined portfolio oversight. We utilize a tactical, trend-following strategy designed to help navigate market cycles and mitigate downside risk, aiming to protect clients from significant financial disruptions. While no strategy can eliminate all risk, we believe our disciplined process helps our clients stay focused on their long-term financial goals.
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** - Our goal is to simplify your financial life. We serve as a comprehensive resource to help address a broad range of financial planning topics, including tax considerations, estate and education planning, Social Security optimization, retirement strategies, insurance, and investment management.
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. This method ensures we are able 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 incorporate both value (buying companies at or below fair value) and momentum (also known as trend following or relative strength) methodologies. These approaches are supported by extensive academic research demonstrating their significance in long-term investment performance. For additional insights, you may review the following resources: [UCLA Anderson Review: Momentum Investing](#) and [Morningstar: The Momentum Factor Explained](#)
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.