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Jackson, Grant

A Julie Jason company

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Integrity, Skill, Results

Our Founder Julie Jason





When You Realize You Need A Change ...

All of our clients had financial relationships with wealth managers and other financial providers before coming to [Jackson, Grant](/about-jackson-grant) for our [personal portfolio management](/what-personal-portfolio-management) services.

People contact us when their financial futures rise to the top of the priority list due to a transitional event. The trigger might be a life transition, such as retirement, divorce, the sale of a business or a home, the illness or loss of a spouse, the receipt of an inheritance, the retirement of a financial adviser, or the realization that it's time to get organized.

We believe the attraction is two-fold:

1. Our experience helping family stewards create secure, prosperous, and satisfying financial futures.
2. Our decades-long tradition of forming deep and lasting relationships with our clients, their families, and their legal and tax advisers.





JG (/about-jackson-grant)

Jackson, Grant (/about-jackson-grant)

We serve a select high net worth clientele (minimum \$5 million) who prefer the special relationship that only a boutique wealth management firm like Jackson, Grant can best deliver. We are “fiduciaries” under the law, registered with the SEC as investment advisers, and function as “investment counsel.”



JJ.(<http://www.juliejason.com/julie-jason-award-winning-columnist-and-author-syndicated-king-features>)

Julie Jason (<http://www.juliejason.com/julie-jason-award-winning-columnist-and-author-syndicated-king-features>)

Julie Jason has directed Jackson, Grant's wealth management practice since founding the firm more than 20 years ago. A proponent of financial literacy, she shares her investment insights through her award-winning books and column, which is syndicated by King Features.

2 High Ridge Park, Stamford CT 06905 Phone: [203.322.1198](tel:203.322.1198) (tel:203.322.1198)

info@jacksongrantus.com (<mailto:info@jacksongrantus.com>)

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