

WEALTH MADE SIMPLE.

Jackson Wealth Management's high net worth clients get more than financial, estate and retirement planning. They get more than tax planning and investment services. They get a one-stop shop wealth management firm that has a tenacious dedication to achieving each client's unique financial goals.

Top 25 Reasons to Choose Jackson Wealth Management

Speak with a financial advisor.
No cost, no obligation.

Name (first and last): *

Email: *

Phone: *

Speak with an Advisor

BUSINESS BUILT ON TRUST

STRAIGHTFORWARD ADVICE

TRANSPARENT FEES



2018 & 2019

Best-In-State Wealth Advisor

George Jackson of Jackson Wealth Management was recognized as one of the top "stand out" wealth advisors in the country by Forbes. This year's Best-In-State Wealth Advisors list spotlights top-performing advisors across the country who were nominated by their firms—and then researched, interviewed and assigned a ranking within their respective states.

Learn More

Does market volatility keep you up

BrokerCheck - Check the background of this investment professional >>

Learn more about our complimentary 295-point Financial Checkup. No Cost, No Obligation. Get a Second Opinion

through our proprietary algorithms and research team, we have now made the Reality Targeting strategy available to all clients.

[Learn More](#)

Download one of our free guides.

6 Blunders Investors Make when they Roll Over Their 401(k)

How to Develop a Retirement Plan in 5 Minutes

5 Ways to Design a Retirement Plan That Never Runs Out of Money

How to Design the Ultimate Retirement Plan Using a Dividend Growth Strategy

Trend Following and Retirement Planning

[Get More Insights](#)

Our financial wealth services are founded on trust, clarity and responsibility.

Our team at Jackson Wealth Management wants to motivate you to live your life by your own design. Once you share with us what you want out of life, our mission is to help you make informed decisions that fit your expectations and vision for the years ahead.

Learn more about our complimentary 295-point Financial Checkup.
No Cost, No Obligation.

Get a Second Opinion

BrokerCheck - Check the background of this investment professional >>

What are your needs for Wealth Management?

Our professional financial advisors at Jackson Wealth Management take the time to build long term relationships with each client. It is imperative to the financial well-being of our clients that trust is built between both parties to ensure we can best help you reach your financial goals.

We believe choosing the right financial advisor is one of the most impactful decisions you can make on your journey to financial freedom.

MEET AN ADVISOR

WHY WE'RE DIFFERENT

Learn more about our complimentary 295-point Financial Checkup.

No Cost, No Obligation.

Get a Second Opinion

George D. Jackson

BrokerCheck - Check the background of this investment professional >>

M

J. ChEC

George was named to Forbes' "Best-in-State Wealth Advisors" list in both 2018 and 2019*. George was named to Registered Rep.'s list of the "Top 100 Independent Financial Advisors in America" published in both August 2008 and November 2010. With a focus on knowledge and facts, George has earned many highly regarded industry designations, including the CERTIFIED FINANCIAL PLANNER™ (CFP), CHARTERED FINANCIAL ANALYST™ (CFA), CERTIFIED PUBLIC ACCOUNTANT™ (CPA), CHARTERED MARKET TECHNICIAN™ (CMT), CHARTERED FINANCIAL CONSULTANT™ (ChFC), and the CHARTERED LIFE UNDERWRITER™ (CLU).

George is a serial entrepreneur and has started more than five companies over his career. With an accounting background George provides his clients with individualized comprehensive financial planning solutions that aim to build and maintain wealth in the most tax efficient manner.

George is CEO and CIO of Jackson Wealth Management with more than \$500 million under management. His son serves as an advisor and works with George on a daily basis. He has a daughter who recently graduated from Rollins College.

*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.

SCHEDULE YOUR COMPLIMENTARY CONSULTATION



Schedule an appointment.

How We Change Lives

Ever since Jackson Wealth Management was founded over 25 years ago, we have strive provide advice with your end goal in mind using strategies to hel

By taking a client-first approach, we strongly satisfaction by h

BrokerCheck - Check the background of this investment professional >>

goal is financ

Learn more about our complimentary 295-point Financial Checkup. No Cost, No Obligation.

Get a Second Opinion

295 Point Financial Checkup

“Up to 88% of patients seeking a second opinion receive a new or refined diagnosis, according to a new study from the Mayo Clinic. Conversely, only 12% receive confirmation that the original diagnosis was complete and correct.”

James Naessens, Sc.D, Journal of Evaluation in Clinical Practice – April 4th, 2017



Schedule a No Cost, No Obligation financial checkup where a team of professional financial advisors will review your financial picture. We will cover 295 different points with you to ensure you have your finances coordinated in your best interest.

[Learn More](#)

[Schedule my Checkup](#)

About Jackson Wealth Management, LLC

Founded in 1992, Jackson Wealth Management is an independent, fee-only investment advisor. Founder George P. Jackson has been the CEO/CIO of the firm since its inception with the goal of delivering value to his clients and his associates.

*Securities Offered through Triad Advisors, LLC. Member FINRA/SIPC
Advisory services offered through Jackson Wealth Management, LLC.
Jackson Wealth Management, LLC is an affiliate of Jackson Retirement Planning, Inc.
Jackson Wealth Management, LLC is not affiliated with Triad Advisors, LLC.*

(800) 578-3181

755 Primera Boulevard, Suite 1001
Lake Mary, Florida 32746

Learn more about our
complimentary 295-point
Financial Checkup.
No Cost, No Obligation.

Get a Second Opinion

BrokerCheck - Check the background of
this investment professional >>