Second-Opinion Service

For friends, family and associates of our valued clients.

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from their advisors — it's not uncommon. We believe that many high net worth investors would value a second opinion on their finances.

In order to help the people you care about achieve their financial goals, we are pleased to offer a complimentary second-opinion service. This meeting offers your friends, family members and associates the same attention that you have come to expect as a valued client of **Jackson Financial Advisors**.

Working with a team that offers customized wealth management strategies
Ask ten investors to define wealth management. Actually, ask ten professionals you consider to be "wealth managers" to do so. You will almost certainly get ten different answers, with many focused on investing. As a client of **Jackson Financial Advisors**, however, we want you to benefit from a professional team that offers a clear vision of the wealth management process.

Our Wealth Management Process

Investment Consulting

- Asset allocation
- Portfolio management
- Manager due diligence
- Risk evaluation
- Performance analysis

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Advanced Planning

- Wealth enhancement, including cash flow, tax planning and liability management
- Wealth transfer
- Wealth preservation
- Charitable giving

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Relationship Management

- Regularly scheduled calls, reviews and in-person meetings
- Outside professionals, including legal, tax, and insurance and advisors

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Our consultative process

We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while we work towards tailoring a plan to help them achieve those goals. As a valued client, you will recognize the five steps below as the process you have experienced with us. The second-opinion meeting is the introduction to this process.

Full client experience

Discovery Meeting → Investment Plan Meeting → Mutual Commitment Meeting → 45-Day Follow-up Meeting → Regular Progress Meetings

What to expect from our second-opinion service

Discovery Meeting → Investment Plan Meeting

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they'll receive a Total Client Profile and a personalized analysis of their current situation.

Let us help you help those you care about. Contact us today.

Jackson Financial Advisors,
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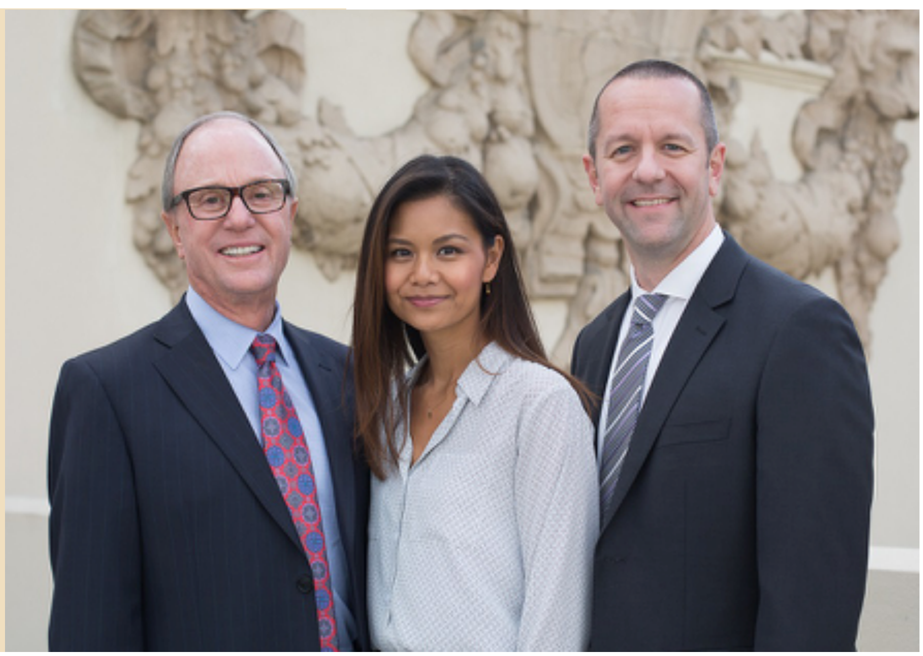

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