



Jackson Retirement Planning, Inc.

Integrated Planning: Investment Planning-Retirement Planning-
Income Tax Planning-Estate Planning - Insurance Planning

1515 International Parkway
Suite 1013

Heathrow, FL 32746

Tel: (407) 585-0235

Fax: (407) 585-0237

Toll Free: (800) 578-3181

Email: george@jacksonretirement.com

Web: www.jacksonretirement.com

What makes us different?	Jackson Wealth Management, LLC	Other firms
Firm's advice model* (pick one of four):		
Wealth Management Firms. Firms whose primary focus is providing holistic advice to all clients, offering integrated tax, estate, and personal financial planning in addition to investment advisory services.	X	
Investment Advisory Firm. Firms whose primary focus is the development of investment strategy and selection of investment managers, although they may offer modular planning services and other advice as needed.		X
Financial Planning Firm. Firms whose primary focus is applying the financial planning process across all client relationships.		X
Investment Management Firm. Firms whose primary focus is the discretionary management of client assets.		X
Investment Operations (pick one of two):		
Model portfolios, client democracy - no preferential treatment to golf partner, ability to block trade multiple accounts efficiently	X	
Each client portfolio is different, making it extremely difficult to review, manage and trade		X
Investment Strategy (Pick one of three):		
Trend following, quantitative, tactical approach to investment management, own market leadership, sell market laggards, "let winners run" approach. The Trend is Your Friend.	X	
Modern Portfolio Theory (MPT), strategic (static) asset allocation, a buy-and-hold approach. Periodic rebalancing is a buy losers, sell winners approach.		X
We buy Quality Stocks (no strategy)		X
High velocity trading		X
Risk Management of the Portfolio (pick all that apply):		
Diversification, many firms rely solely on diversification as their one-and-only risk management investment tool.	X	X
Overall Portfolio Value. Called an equity market line. If the overall portfolio value declines sharply, it is time to man the lifeboats.	X	
Monitor Individual Holdings. If a single investment in a portfolio declines a given amount, it is jettisoned from the portfolio.	X	
Independent CPA firm Verification (pick one):		
Wealth management firm verified to be in compliance with Global Investment Performance Standards (GIPS) by an independent CPA firm.	X	
No GIPS verification of firm by independent CPA firm.		X
Other Services (pick all that apply):		
Income tax advice, at no charge to investment clients	X	
Income tax planning, at no charge to investment clients	X	
Income tax return preparation****, at competitive rates	X	
Estate tax planning**, at no charge to investment clients	X	
Estate settlement**, should a client pass away we meet with the heirs and assist in all settlement activities, life insurance proceeds collection, re-titling of assets, assist with tax strategies like stretch IRA tax planning, at no charge to investment clients****	X	
Retirement planning strategies, including tax efficient withdrawal strategies to fund monthly retirement cash flow, at no charge to investment clients	X	
Risk management*** (long-term care planning, disability planning and life insurance planning) at no charge to investment clients	X	
Asset protection strategies** for at risk professionals and other clients, at no charge to investment clients	X	
* Definitions of firm's advice model described in 2009 Moss Adams/Investment New s Adviser Compensation and Staffing Study		
** Attorney's fees may apply.		
*** Jackson Retirement Planning, Inc., an affiliated firm, earns a commission on any life insurance, disability insurance or long-term care insurance purchased by client.		
**** If estate tax returns are required, a competitive fee is charged		
***** Provided by affiliated firm, George P. Jackson, PA, CPA		

Jackson Wealth Management, LLC. claims compliance with the Global Investment Performance Standards (GIPS®). Jackson Wealth Management, LLC. is an independent registered investment adviser. To receive a complete list and description of JWM investment composites and/or presentation that adheres to GIPS standards, contact Ken Ehrhardt at 407-585-0235, or write to Jackson Wealth Management, 1515 International Parkway Suite #1013, Heathrow, FL 32746, or e-mail Ken@jacksonretirement.com.

Securities offered through Triad Advisors, Inc. Member FINRA/SIPC
Advisory Services offered through Jackson Wealth Management, LLC.
Jackson Wealth Management, LLC is not affiliated with Triad Advisors, Inc.