
D|A|DAVIDSON

# THE JACKSON WEALTH STRATEGY GROUP

A member of D.A. Davidson & Co. member SIPC

STRAIGHTFORWARD | ORGANIZED | DISCIPLINED

**Michael J. Jackson, CWS®**
Senior Vice President,
Financial Advisor, Branch Manager

**Melissa Holling, FPQP®**
Supervisory Branch Operations Manager

jacksonwealthstrategygroup.com

> *When you work with The Jackson Wealth Strategy Group, you have a valuable ally for understanding and navigating the complexities of the financial world. We work closely alongside you each step of the way, helping you craft investment management goals and a strategy – unique to you alone – that will carry you through all stages of your life.*

## Meet the team:

**Michael J. Jackson, CWS®**

Senior Vice President,
Financial Advisor,
Branch Manager

Michael believes client trust and exceptional service are core to everything The Jackson Wealth Strategy Group stands for. He strives to educate clients and maintain multi-generational relationships through mutual trust, careful planning and strategies uniquely suited to each client or family.

Michael joined D.A. Davidson in 2009 as a Financial Advisor and now also serves as Branch Manager for the Spokane, Walla Walla and Pendleton offices. He was honored with the Gerry Meyer Branch Manager of the Year Award in 2017 and has been a member of the firm's President's Club. He has also served as Chairman of the firm's Financial Advisor Advisory Council, a body of professionals who work closely with firm management to ensure a mutual environment of advocacy on behalf of clients.

An ardent believer that his own professional growth benefits clients, Michael has earned the Certified Wealth Strategist® designation through the Cannon Financial Institute. He also holds a bachelor's degree in business management from Gonzaga University, where he was a member of the Zag baseball team from 2000 to 2002.

He and his wife, Heather, have two children. They are active in year-round outdoor activities, and are avid Gonzaga Bulldog supporters and former Bulldog athletes. Go, Zags! They both work closely with local charities, primarily those focused on cancer research and patient support.

**Melissa Holling, FPQP®**

Supervisory Branch Operations
Manager

Besides her work delivering personalized service to our clients, Melissa provides strong support to the other members of The Jackson Wealth Strategy Group, with core responsibilities that include account servicing, operations and daily practice administration. She takes pride in continuing her professional education and has completed the course study on Foundations in the Financial Planning Program through the College of Financial Planning to earn the Financial Paraplanner Qualified Professional™ designation.

Melissa joined D.A. Davidson in 2009, alongside Michael, with extensive prior experience in the financial services industry. She has served as the team's Senior Registered Associate since 2004. The strong service she offers to our clients has been honed during her work in the industry that began in 1993.

## Our Philosophy:

As a valued client of ours, you and your interests are our priority, period. Our goal, as your trusted partner, is to be effective for the long term with a straightforward, organized and disciplined approach. Collaboration with you is important to us. We encourage you to ask questions because your knowledge of your investment choices and direction is critical to the long-term success of our relationship. Our mission is to discover what is most important to you and then help you develop a financial strategy that will help you achieve your own personal vision.

## Our Process:

**1**

### Establish Our Relationship

- We firmly believe we can serve you to the best of our abilities only after getting to know you. Taking the time to fully understand your goals and desires, even beyond finances, is an integral part of developing an appropriate recommendation specific to you.

**2**

### Construct Your Financial Strategy

- We examine the important attributes of your personal financial situation – including your objectives, time horizon, risk tolerance, liquidity needs and tax situation – to put ourselves in your "shoes" and provide a recommendation that is complete only after we would feel comfortable following it ourselves.

**3**

### Implement

- With your financial goals embedded in our recommendation, we select an optimal strategy specifically designed to help you meet your objectives.

**4**

### Continuous Review

- Life does not stay stagnant, and neither should your financial plan. Your plan is only a beginning, as we embark on the journey to meet and exceed your financial goals through thoughtful follow-up and the ability to adapt with you as life changes. We look forward to a lifelong partnership with you.

## Level of Engagement

### Diamond

- Quarterly Review/Planning Sessions; Offered Either in Person or by Phone
- Goal Planning – Short- & Long-Term
- Customized Allocation & Investment Portfolio
- Tax Planning/Investment Coordination
- 401(k) Consultation and Coordination
- Estate/Will/Trust Planning
- Risk Management – Insurance & Annuities
- Multi-Generational Planning
- FamilyCare
- Online Account Access

### Platinum

- Annual Review/Planning Session Offered in Person; Quarterly Review Offered by Phone
- Goal Planning – Short- & Long-Term
- Customized Allocation & Investment Portfolio
- Tax Planning/Investment Coordination
- 401(k) Consultation and Coordination
- Estate/Will/Trust Planning
- Risk Management – Insurance & Annuities
- Multi-Generational Planning
- FamilyCare
- Online Account Access

### Gold

- Annual Review/Planning Sessions; Offered by Phone
- Goal Planning – Short- & Long-Term
- Asset Allocation Based on Goals, Objectives, & Risk Tolerance
- Tax Planning/Investment Coordination
- 401(k) Consultation and Coordination
- Online Account Access

## Our Services

- **Comprehensive Wealth Planning and Management**
- **Investment Management**
- **Short- and Long-Term Goal Planning**
- **Retirement Planning**
- **College Planning**
- **Tax Planning/ Investment Coordination**
- **401(k) Consultation and Coordination**
- **Estate/Will/Trust Planning through D.A. Davidson Trust Company**
- **Risk Management – Insurance and Annuities**
- **Multi-Generational Planning**
- **FamilyCare**

# Our Extended Team:

With The Jackson Wealth Strategy Group, you also benefit from the many resources of D.A. Davidson & Co., the largest full-service investment firm based in the Northwest. Our company offers a range of personalized advice and investment services designed to help you plan for a future with great financial possibilities.

### Ryan Halleran

Senior Vice President,
Director of Wealth
Planning

### Wealth Planning

Ryan offers expertise in the complex world of wealth planning and delivers customized strategies in the areas of estate planning, business succession, philanthropic giving and more. The wealth planning team will work with you to develop a wealth plan and explore various tax strategies, providing specific recommendations.

### Steve Condon

President,
Asset Management
and Trust

### Legacy Planning

D.A. Davidson & Co.'s professionals work with you to help define and realize all types of life and legacy goals. Whether your ultimate objective involves saving for a child's education, planning for retirement, or selling a business, our experienced team is dedicated to developing a comprehensive, personalized plan that can help you achieve your unique goals.

### Brittany Cross

Vice President,
Director of Insurance
and Annuities

### Davidson Insurance

Britt is dedicated to bringing holistic risk management solutions to light as part of an overall financial plan for individuals, estates and businesses. She started in the industry in 2004 and has held multiple positions that helped contribute to her understanding of the insurance and annuity marketplace.

# The D.A. Davidson Advantage:

Since 1935, D.A. Davidson has grown to become the largest full-service investment firm based in the Northwest, offering a sophisticated suite of investment and financial services. Providing individual investors and businesses with a full menu of integrated financial products and services, we believe there is only one way to navigate through the wealth of financial service options: straight forward. D.A. Davidson offers clear strategies with smart, personalized solutions that match your goals and show you the path to achieve them.


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**Michael J. Jackson** (509) 456-8323
mjackson@dadco.com

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