



D|A|DAVIDSON

# THE JACKSON WEALTH STRATEGY GROUP

STRAIGHTFORWARD | ORGANIZED | DISCIPLINED

## **Michael J. Jackson, CWS®**

Senior Vice President, Market Director, Branch Manager, Financial Advisor, Portfolio Manager  
CA Insurance Lic. #0E98323 | D.A. Davidson CA Insurance Lic. #0763476

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## **Alesha Lozano**

Senior Registered Associate

[JACKSONWEALTHSTRATEGYGROUP.COM](http://JACKSONWEALTHSTRATEGYGROUP.COM)

# THE STRENGTH OF ADVICE

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,  
Market Director,  
Branch Manager,  
Financial Advisor,  
Portfolio Manager

CA Insurance Lic. #0E98323

D.A. Davidson CA Insurance  
Lic. #0763476

**(626) 773-4245 | [mjackson@dadco.com](mailto:mjackson@dadco.com)**

Michael joined D.A. Davidson in April 2009 as a Financial Advisor and now serves as the Market Director for the Greater Los Angeles area. Prior to that he was the Branch Manager responsible for the firm's wealth management offices in Eastern Washington & North Idaho for more than a decade. Michael graduated with a B.A. in Business Management from Gonzaga University in 2003, where he was also a member of the Zag's baseball team from 2000-2002.

Michael believes that client trust is core to everything that our practice stands for at D.A. Davidson. He has continued his dedication to the practice through additional education and licenses. Michael carries the Certified Wealth Strategist® designation earned by completing the Comprehensive Wealth Management Program with the Cannon Financial Institute.

Michael has been a member of the firm's President's Club and has been a multi-year recipient of the Gerry Meyer Branch Manager of the Year award in 2017 and 2022. In past years he has served as the Chairman for the firm's Financial Advisor Advisory Council, and has been a member of the firm's Leadership Council.

Michael and his wife, Heather, have two children. After many amazing years residing in the Inland Pacific Northwest, they now call Southern California home. They are very active in year-round outdoor activities, and are avid Gonzaga Bulldog supporters and former bulldog athletes. Go Zags! Both of them work closely with a number of charities, primarily those focused on cancer research and patient support.



**Alesha Lozano**

Senior Registered  
Associate

**(509) 462-6361 | [alozano@dadco.com](mailto:alozano@dadco.com)**

Alesha Lozano is a lifetime resident of Spokane and has been with D.A. Davidson since March of 2023. She comes with extensive prior experience having served as a Registered Client Service Associate at UBS Financial Services since 2011 where she obtained her Series 7 & 66 registration licensing requirements. Alesha previously worked in the banking industry for 7 years prior to her career in wealth management. She is an alumna of Eastern Washington University and obtained her B.A. in Business Administration with an emphasis in Human Resource Management in 2009.

Alesha plays a strong role on our team as a Senior Registered Associate providing operational and administrative support as well as facilitating the financial planning process. Alesha is very personable and enthusiastic in her approach to building strong connections with clients. Outside of providing general account management and client support, she enjoys getting to know clients and understanding their financial needs. Using skills from her previous experience, she has implemented effective practices within our team's service model with the goal of enhancing and improving overall client experience and internal processes. In her free time, Alesha's interests include baking, yoga, the outdoors, and spending time with her family.



## 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

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- 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

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- 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

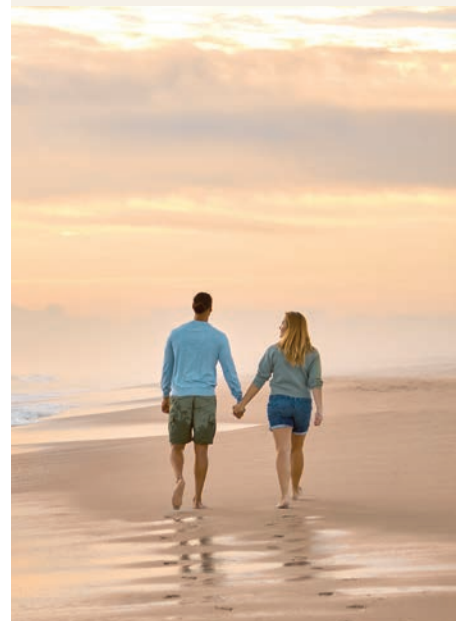
## Gold

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- 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 Professional 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 Companies, a large 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.



**Steve Condon**  
President,  
D.A. Davidson Trust  
Company

**(206) 389-4089 | [scondon@dadco.com](mailto:scondon@dadco.com)**

Steve oversees D.A. Davidson Trust Company, where he has broad oversight responsibility for ensuring the trust company provides comprehensive planning for its clients and also for management of the firm's team of professionals. Steve joined the firm in April 2015 after previously serving as President of The Corundum Group in Colorado Springs. Additionally, he was a founder and board member of Central Bancorp, Inc., a diversified holding company operating not only Corundum but also a commercial bank, mortgage company and an affiliated insurance company. Steve holds a bachelor's degree in business administration from the University of Minnesota's Carlson School of Management.



**Diana George**  
Vice President,  
Director of Wealth  
Planning

**(801) 333-3139 | [dgeorge@dadco.com](mailto:dgeorge@dadco.com)**

Diana brings diverse industry experience to her role as Director of Wealth Planning, with more than 30 years in banking focused on helping business owners and their families plan for both their personal and business needs. She joined D.A. Davidson in 2026 after most recently serving as the Senior Director, Family Wealth Consulting for the Western Region of Key Private Bank. In that role, she led business advisory and family consulting practices and provided complex advanced planning services. Prior to Key Bank, Diana held varied leadership roles in private banking assisting HNW and UHNW families and clients with advanced planning needs, as well as experience in commercial banking, business banking, and relationship management. In addition to her financial services experience, Diana has a deep educational background, holding a Master of Taxation from Weber State University, an MBA from Colorado State University, and a Bachelor of Science in Accounting from the University of Phoenix.



**Rob Roels, CFP®**  
Vice President,  
Assistant Director  
of Wealth Planning

**(503) 863-5066 | [rroels@dadco.com](mailto:rroels@dadco.com)**

Rob works with D.A. Davidson financial professionals by delivering customized strategies for clients regarding estate planning, business succession, and wealth transfer or tax minimization questions. His 30-year career in banking and financial services has included a wide range of roles and responsibilities, most recently as senior financial planner for Umpqua Private Bank, where he led the planning efforts for the firm. Rob earned the CFP® certification in 2010, and the Enrolled Agent credential from the IRS in 2016, each informing his work as a planner, and passionate advocate and trainer on planning.



**Rebecca Kalinowski**

Vice President,  
Director of Product,  
Lending & Cash

**(303) 571-6125 | rkalinowski@dadco.com**

Rebecca is responsible for providing customized lending advice for clients and collaborating with financial professionals on how to utilize lending solutions. She has 10+ years of advising companies and individuals on solutions to solve liquidity needs to fund business operations, lifestyle needs, tax obligations, or large asset purchases. Rebecca previously worked for various fintech startups and J.P. Morgan Private Bank. She holds a BS in Business Administration and International Relations from Carroll University and an MBA in International Business and Marketing from Brandeis International Business School.



**Matt Mendez**

Vice President, Director  
of Insurance & Annuities

**(206) 903-8669 | mmendez@dadco.com**

Matt aspires to help advisors understand, expand, and refine the role insurance and annuities play in their clients' portfolios. He is fluent in the products and technology supporting insurance and annuities, including annuity order entry systems, insurance products, estate planning, and fixed, variable and fee-based annuities. Before joining the firm, he worked for Independent Financial Group, where he built and managed annuity product offerings and sales strategy, and he has worked in other various consulting and sales roles across the industry. Matt's extensive experience plays a vital role in helping financial professionals provide consultation on client cases.

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## The D.A. Davidson Advantage:

Since 1935, D.A. Davidson has grown to become a large 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.

**Michael J. Jackson (626) 773-4245**  
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