WANT TO INCREASE YOUR REVENUE WITH YOUR

HIGH-NET-WORTH CLIENTS?

Co-brand with a trusted personal finance coach
or boost your income leveraging my expertise.

YOUR BUSINESS. YOUR VALUE-BASED SOLUTION. YOUR WAY

1 Financial Coaching

I often ask prospects if they are T.I.R.E.D of being out of the loop. Intelligent financial outcomes come from insight, clarity and professional partnership with:

- Tax & Charitable Planning
- Insurance Review and Gap Analysis
- Retirement & Business Valuation
- Employee Benefit Analysis
- Debt Management & Cash Management

2 Investment Analysis & Benchmarking

No one should have to work harder or longer than they need to. It's important that we trace these inefficiencies that cost investors thousands of dollars on an annual basis:

- Tax Drag
- Poor Risk/Return Investments
- Eliminate AUM fees
- Excessive Commissions & Fund Expenses
- Poor Real Estate Analysis

3 Estate Plan & Asset Protection Review

This often gets overlooked until its too late. I want my clients to have a trust, will, power-of-attorneys, healthcare directives, guardians and prudent beneficiary designations. I also review current entity structures to ensure investment and operating activities are separate and creditor protection strategies.

Chris Jackson MBA, CFP, EA

Chris Jackson is the founder of the fee-only financial planning firm Lionshare Partners, whose mission to teach men and women the art of managing their money, risks, and financial future draws on a decade of multidisciplinary experience helping clients solve their financial challenges. Prior to founding Lionshare, Chris help managed over 300 million dollars of individual and institutional assets, held senior roles at multiple globally recognized investment firms.

Chris has become an established financial expert and a go-to resource for personal finance topics. He has been quoted in over a dozen media outlets (CNN, HuffPost, iHeart Radio, AP, US News, etc), and has spoken on personal finance strategies at TD Ameritrade, Charles Schwab, & JPL Nasa. Chris graduated from UCLA, studied Investment Theory & Financial Accounting at Harvard University and has an MBA in Financial Planning at Cal Lutheran.

Help Your Clients Take Back Their Future

- Save thousands of dollars by shifting from AUM fees to flat-fee financial planning
- Work with a true fiducary that doesn't sell products but advice
- Eliminate the expense of starting an RIA or hiring an in-house financial planner
- Gain an additional $1-$2k per client through our Referral Program

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Attorneys can make a great salary but often have no idea what to do to maximize their wealth and set themselves up for a comfortable future. For many years I was one of those clueless attorneys when it comes to financial planning, but Chris Jackson's advice has lifted me out of my financiall foolishness and set me up! Truly a godsend!

Erin Ranahan, Partner, Winston & Strawn

As busy professionals we are constantly inundated with salesmen, agents and brokers looking to pitch us a financial product. We are looking for pragmatic and value-driven advice amid this chaos. Chris Jackson's insights, judgment and knowledge in this area are second to none.

Robbie Ketch, General Manager, Lasco Acoustics & Drywall

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