Jamie Lima Launches the Emerging Millionaire Method™

Woodson Wealth Management to deliver customized financial plans to emerging millionaires with innovative and streamlined process.

RAMONA, CALIFORNIA, UNITED STATES, December 2, 2020 /EINPresswire.com/ -- Woodson Wealth Management, a fee-only financial planning firm founded by Jamie Lima, which opened earlier this year, is excited to announce the introduction of a streamlined financial planning method designed for busy entrepreneurs. The Emerging Millionaire Method™ is designed for mid-level executives, entrepreneurs, and those with sights on the C-Suite but can ultimately be used by anyone who quickly wants to get a financial plan in place.

“I spent my entire career working for large organizations, overseeing nearly $1.8 billion in assets and hundreds of households along the way. Many clients get lost in the financial planning process and often never know what comes next or who’s-doing-what. With our streamlined and structured process, we can deliver a plan that, in just a few weeks, even the busiest of executives can execute upon,” said founder and president, Jamie Lima.

“With 3 kids and 2 step kids of my own, along with a full-time business to run, I know how hard it can be to keep things on track. We’re all juggling multiple responsibilities, and financial planning is easy to push to the side. Not to mention, the old way of building a financial plan is a painstaking exercise in gathering documents, completing forms, driving to and from the planner’s office, and so on. Who wants that? We are 100% virtual and technology-driven so we take a lot of those pains away and can deliver financial advice in just a few virtual meetings.

Jamie Lima created the process based on the CFP® Board of Standards framework and after 15 years working as a financial planner for Morgan Stanley and, most recently, Fidelity Investments. Jamie brings a wealth of knowledge in the areas of financial planning, investment strategy, and incentive compensation. Jamie has a degree in finance and received his MBA from National University in San Diego. As a CERTIFIED FINANCIAL PLANNER™ the firm's mandate is to approach all of the advice provided from a fiduciary perspective.

To learn more about Woodson Wealth Management, please visit www.woodsonwm.com.

About Woodson Wealth Management

Woodson Wealth Management is a fee-only financial planning and investment management firm dedicated to serving Gen X, Gen Y, and pre-retirees without product sales or steep minimums. Woodson Wealth Management advisors seek to create strategies for our clients so they can continue to do what they love to do with ZERO financial stress.

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