

# Jamie Lima Launches Subscription-Based Financial Planning Program

*Woodson Wealth Management to offer subscription-based financial planning to ensure everyone has access to cost-effective financial advice.*

RAMONA, CA, USA, January 18, 2021 /EINPresswire.com/ -- Woodson Wealth Management, a fee-only financial planning firm founded by Jamie Lima, which opened last year, is excited to announce the introduction of a subscription-based financial planning offering, which anyone can take advantage of. On the heels of the firm's launch of The Emerging Millionaire

Method™ last month, Woodson Wealth Management's Subscription-Based Financial Planning offering is design to provide much-needed financial advice to those who normally couldn't afford it



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*Jamie Lima*

“I spent my entire career working for large organizations, overseeing nearly \$1.8 billion in assets and have worked with hundreds of households along the way. Many people, who could really use financial advice, were either priced out of getting it or, frankly, they wouldn't meet the firm's minimums,” said founder and president, Jamie Lima.

“With our subscription-based service, we can deliver financial plans and help people make secure financial decisions for a small monthly fee. Unlike other firms, we

don't have a ton of overhead and don't have specific requirements to work with us. Folks just have to be interested in improving their financial situation. More important, we don't make it a rule that we have to manage the portfolio in order to work with us. We're not fitting clients into a box; we're building the box around them.

Jamie Lima created this program after 15 years of 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](http://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 retirees for a monthly subscription fee and 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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Founder & President Jamie Lima

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