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Woodson Wealth Management Begins Its Planned Expansion

Woodson Wealth Management announces the opening of its new office in Austin, TX

RAMONA, CALIFORNIA, UNITED STATES, September 20, 2022 / EINPresswire.com/ -- Woodson Wealth Management announced today that Drew Schlotter, CFP® has joined the firm and is leading the company's expansion into the Southwest.

Woodson Wealth Management

Mr. Schlotter will work out of the company's Austin, TX location and will focus his efforts on working with Gen X and Gen Y clients on their traditional financial planning needs, with an area of specialization in college planning.

Schlotter started his career at an independent RIA serving the community of Brenham, a small Texas town outside of Houston. He later moved to the Dallas area where he acted as the central financial planner supporting a team of advisors managing $3 billion in assets for roughly 800 high net-worth clients.

In 2021, he set out to start his own RIA and after a year and a half as a solo advisor, Drew found kindred spirits at Woodson Wealth Management, and was excited to be part of a team once again. He is passionate about helping clients live fulfilling lives and has a particular interest in solving the challenges young families face around planning for college and managing student loans after graduation.

“I was really incredibly lucky to find an advisor that has a proven track record of success to join our small (but growing) firm,” said founder and president, Jamie Lima. Lima went on to say, “To have someone join us with an area of focus that is so important to many of our clients is an incredible opportunity for us - and them.”

“We have some other exciting announcements coming with the addition of another advisor or two planned for later this year,” Lima continued. “More to come on that, but I cannot stress enough how important it is for us to bring talent to the firm like Drew.”

Jamie Lima launched Woodson Wealth Management after 15 years working as a financial planner for Morgan Stanley and, more recently, Fidelity Investments. Woodson Wealth Management is made up of a team of CERTIFIED FINANCIAL PLANNER™s and customer-centric support staff. The firm’s mandate is to approach the advice they provide their clients 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, with offices across the country, dedicated to helping our clients manage, maximize, and grow their wealth. We do so with a simple monthly subscription fee and without product sales or steep asset minimums like other advisory firms.

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