

Woodson Wealth Management Opens its Newest Office in Houston, TX

Woodson Wealth Management now serving clients locally in 7 cities and virtually across the country

RAMONA, CA, UNITED STATES, April 11, 2023 /EINPresswire.com/ -- Woodson [Wealth Management](#) announced today that Amy Zamikovsky, Esq., CFP®, CPWA® has joined the firm and will help further the [company's expansion](#) into the southeastern United States.

Ms. Zamikovsky will be based in Houston, Texas and work with clients locally and virtually. By way of background, Zamikovsky started her financial services career in 1999 at Spectrum Financial Group in Dallas, and more recently worked for "The Thundering Herd" at Merrill Lynch where she worked alongside teams as a financial planner working with high-net worth clients.

Ms. Zamikovsky is one of a very few actively practicing attorneys in the State of Texas who also hold the CFP® designation. This means that Zamikovsky brings the opportunity to serve clients across two incredibly important aspects of people's lives: [estate planning](#) and financial planning.

As Zamikovsky noted, "Estate Planning and Financial Planning are so interwoven I could not imagine doing one without the other. They are truly my favorite kind of puzzle! The complexities



Amy Zamikovsky, Esq., CFP®, CPWA®



of the modern-day family are ever-increasing, and no two families are ever close to the same.”

“I was really incredibly lucky to find two advisors that have a proven track record of success to join our small (but growing) firm just a few short months ago, and now here we are. Adding another top-notch, well-rounded, and extremely talented advisor,” said founder and president, Jamie Lima. Lima went on to say, “To immediately add another 20 years of experience to the team with this hire is an incredible opportunity; not only for us, but for our clients as well. We now have over 100 years of experience on the team.”

“We plan to add up to five more advisors to the firm this year.” Lima continued, “with the talent we have now, the growth in the independent advisor space, and the ability to have our advisors work where, when, and how they want, I am excited to see what 2023 has in store for us.”

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™ professionals and customer-centric support staff. The firm’s mandate is to always do what is right, act as a fiduciary during their client engagements, and have fun doing it.

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.

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