

Woodson Wealth Management Opens its Second Office in New York

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

SAN DIEGO, CA, UNITED STATES, June 27, 2023 /EINPresswire.com/ -- [Woodson Wealth Management](#) announced today that [Jason Lampert, CFP®](#) has joined the firm and will help further the company's expansion into the northeastern United States.

Mr. Lampert will be based in New York, NY, and work with clients locally and virtually. "Jason is a dynamic and multi-talented professional who brings a unique blend of expertise and enthusiasm to the world of personal finance," founder and president of Woodson Wealth Management, [Jamie Lima](#) noted and continued, "as a

CERTIFIED FINANCIAL PLANNER™, Jason has dedicated himself to helping individuals achieve financial success while navigating life's twists and turns."



Jason Lampert, CFP®

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It's hard to get where you're going, without a destination AND a map, unless you want to go nowhere."

Jason Lampert

Mr. Lampert made a career transition from corporate IT support and networking engineer to financial planner, and he understands the importance of following one's passions and embracing change. His own journey has given him a wealth of experience and empathy when working with individuals who are also seeking a new direction in their lives.

As an actively involved supporter of the LGBTQIA+ community and the childfree movement, Mr. Lampert understands the importance of embracing diverse identities and lifestyles. Through his

comprehensive approach to financial planning and his experience as a financial counselor and coach, Jason ensures that everyone, regardless of background or identity, has the opportunity to thrive financially.

So, whether he's building financial strategies, guiding clients towards financial freedom, or immersing himself in the latest gaming adventures (he's an avid gamer), Mr. Lampert is a professional who works with his clients to clarify their goals and values, and move toward their visions of the future. "It's hard to get where you're going, without a destination AND a map, unless you want to go nowhere," Lampert says.

"I have been blessed to bring advisors to the team that have a proven track record of success this past year. Adding another top-notch, well-rounded, and extremely talented advisor to add 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 120 years of experience on the team," Lima noted.

"We plan to add three 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 the remainder of 2023 and 2024 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.



Jamie M. Lima, Founder of Allegiant Divorce Solutions



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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