

Woodson Wealth Management Opens its Next Office in Rochester, New York

Woodson Wealth Management now serves clients locally in seven cities and virtually across the country

SAN DIEGO, CA, UNITED STATES, July 25, 2023 /EINPresswire.com/ -- [Woodson Wealth Management](#) announced today that [Alex Doyle, CFP®](#) has joined the firm and will continue to further the company's expansion into the northeastern United States.

Mr. Doyle will be based in Rochester, NY, and work with clients locally and virtually.

"Alex has a ton of experience working with professionals to help them better manage their corporate benefits and executive compensation," founder and president of Woodson Wealth Management, [Jamie Lima](#) noted. Lima continued, "being recognized as a

recipient of the Five Star Wealth Manager Award for both 2020 and 2021, Alex's commitment to delivering exceptional financial guidance and service to his clients is remarkable."



Alex Doyle, CFP®

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Rather than pushing products or services, my focus is on educating and empowering my clients. ”

Alex Doyle

Having personally experienced the challenges of financial hardships while growing up in one of New York state's poorest counties, Mr. Doyle understands the weight that financial stress can place on individuals and their loved ones. It is this understanding that motivates him to dedicate his time and energy to ensuring that others do not have to face the same level of stress that his parents and loved ones did.

“Rather than pushing products or services, my focus is on educating and empowering my clients.

I strive to be a trusted partner, providing unbiased guidance and working collaboratively to help them make informed decisions that align with their best interests and financial goals," Mr. Doyle went on to say.

Mr. Doyle's career began as a registered representative of a broker-dealer and an insurance agent. However, he made a conscious decision to distance himself from the conflicts of interest commonly found in commission-based environments. Instead, he adopted a "fee-only" approach that allows him to foster a transparent and client-centric approach.

"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 130 years of experience on the team," Lima noted.

"We plan to add three 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 all client engagements, and have fun while doing it.

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



Jamie M. Lima, Founder of Allegiant Divorce Solutions



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.

Jamie Lima

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