

Woodson Wealth Management Opens its 8th Office in Temecula, CA

Woodson Wealth Management serves clients locally in eight cities and virtually across the country.

SAN DIEGO, CA, UNITED STATES, August 15, 2023 /EINPresswire.com/ -- [Woodson Wealth Management](#) announced today that [Michael Anderson, CFP®](#) has joined the firm and will continue to further the company's expansion across the United States.



Mr. Anderson will be based in Temecula, CA, and work with clients locally and virtually. "Michael and I have had an opportunity to work together in the past during our time at Fidelity Investments. He is a proven professional and has a high level of ethics, which every good advisor has," founder and president of Woodson

Wealth Management, Jamie Lima noted. Lima continued, "There was a moment when I was almost his branch manager at Fidelity until they decided to hire an external candidate instead. Life works wonders sometimes, and now we have the opportunity to work together again, which I am incredibly excited for."

“

I became a CERTIFIED FINANCIAL PLANNER™ in 2021 and joined Woodson to further use and expand my planning offering to people that are often underserved by the financial industry.”

Michael Anderson

Anderson grew up in Kansas City as one of the middle children of six kids. He shares: "We never had a lot, and this ignited my interest in finance and financial planning. My first job was as a bank teller at age 15 (they were impressed that I wore a suit to the interview!)."

Starting his career at Fidelity Investments in Salt Lake City while finishing his degree in Business Management, Mr. Anderson worked as a trader, then later as a Relationship Manager, and finally an advisor for Fidelity Investments over 9 years before joining Woodson.

“I became a CERTIFIED FINANCIAL PLANNER™ in 2021 and joined Woodson to further use and

expand my planning offering to people that are often underserved by the financial industry,” Mr. Anderson noted and continued, “Today, I focus on early and mid-career professionals who need planning and advice in a world of shifting goals and values. Many people today have a different idea about career and retirement than previous generations. I seek to integrate rather than box my clients into “conventional wisdom.”

Mental health is a key focus of his practice as he is uniquely positioned to help clients that struggle with financial decision making due to his own ADHD, anxiety, or other conditions. Often praised by clients for empathy, understanding, and ability to teach complex concepts in a relatable way, Mr. Anderson will head up the firm’s efforts in assisting others financially in this area.

“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 140 years of experience on the team,” Lima noted.

“We plan to add two to 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,



Michael Anderson, CFP®



Jamie M. Lima, Founder of Woodson Wealth Management

and have fun while 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.

#

Jamie M Lima
Woodson Wealth Management

+1 8583504386

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

[Instagram](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/649847274>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.