



JAKE ACKERMAN
LPL Wealth Advisor

I bring 10 years of market experience and education to the forefront. With a commitment to active market trading and professional

portfolio management, I am committed to assisting individual clients to work toward their financial needs and goals. I am committed to assisting individual clients meet their financial needs and goals. To accomplish this, I develop investment plans around my client's long-term goals and risk tolerance while providing proactive management and customer service. Portfolios are structured to address specific financial goals and needs while evaluating any major shifts in the markets in order to balance portfolios and address specific financial goals. Backed by the vast resources of Ackerman Financial Group and LPL Financial.

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ERNEST JOHNSTON
LPL Investment Executive

With over 33 years of experience in financial services, I am dedicated to helping individuals address their financial needs by

developing plans around their long-term goals and risk tolerance. My extensive experience – throughout major shifts in the markets – enables me to help my clients structure balanced portfolios to address their specific financial goals. Backed by the vast resources of Ackerman Financial Group and LPL Financial, I am fully invested in my clients.

I was a Finance major at the University of Memphis, and I have earned a Ph.D. degree in Religious Studies from Trinity College.

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A PERSONAL APPROACH TO INVESTING



1212 Court St. Suite A
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Ackerman Financial Group is a financial service provider in Clearwater, Florida. We provide **wealth management** services to manage our client's financial futures in our area and nationwide. It is our goal to help you to successfully prepare for your financial future.

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC.

The LPL Financial registered representative(s) associated with this brochure may discuss and/or transact business only with residents of the states in which they are properly registered or licensed. No offers may be made or accepted from any resident of any other state.



WE TREAT YOUR MONEY AS IF IT WERE OUR OWN

WEALTH MANAGEMENT

Wealth management is a planning process, where our advisors get a better understanding of your investment goals and objectives. We then tailor a personalized investment strategy, which will allow us to implement a plan to address your personal objectives. At Ackerman Financial Group, we take a proactive approach by being active with your investment. We have 30+ years of experience navigating both good and bad markets to effectively manage any situation.

FINANCIAL PLANNING

Relying on our decades of experience, combined with our technology, will allow us to build a comprehensive financial plan. This plan will address the needs and manage the expectations for you and your family. We accomplish this by determining your personal goals, needs, wants, wishes and then implement a suitable financial plan that aims to meet those objectives.

TAX PLANNING

Strive to keep more money in your pockets or your business assets by aligning with our qualified team of professional partners, we have the experience in tax-planning to maximize tax benefits allowable to manage your tax burden. It is not always about how much you make, but rather how much you keep that counts.

RETIREMENT PLANNING

We select appropriate investments that aim to have a safe and predictable cash flow that will allow more financial freedom to enjoy in your retirement. Be in the driver seat when you retire, as opposed to sitting in the back seat allowing economic circumstances to affect your situation.

DISCIPLINED INVESTMENT PROCESS

A well-designed investment plan should not only reflect your long-term goals and a comfortable level of risk, but it should also serve as the foundation of our long-term relationship. Together, we'll follow a four-step process to develop your customized investment plan.

STEP 1: UNDERSTAND YOUR GOALS

We conduct a personal interview with you to obtain the background data needed to develop your plan. If appropriate, we also consult with other professional advisors, including your attorney and tax advisor, to understand all pertinent details of your financial circumstances.

STEP 2: DEVELOP A PLAN

Our second meeting is designed to develop a shared vision of your dreams. We will prepare a comprehensive presentation for you to consider, and you will have the opportunity to raise questions and confirm the interpretation of your investment goals. We will then review specific investment recommendations for your approval.

STEP 3: IMPLEMENT RECOMMENDATIONS

We believe it is imperative that you understand and are comfortable with your investment strategy. Once I have worked out the details with you and received your approval, we will put your plan into action.

STEP 4: EVALUATE PROGRESS

Investing is not a one-time event. Rather, an investment plan requires continual evaluation to ensure that it stays on target. Your plan will be reviewed regularly, and the allocations within your portfolio will be rebalanced as necessary based on changes in the markets and in you life. Once your plan is in place, you will receive monthly statements, quarterly valuations of your portfolio and an annual tax summary.



Ackerman Financial Group is a wealth management firm with a combined 30+ years of wealth management experience based in the Clearwater/Tampa area. Our investment philosophy is “**we treat your money as if it were our own**”. Your investments deserve constant care and attention. We are proactive managers with sophisticated trading experience, specializing in market timing, custom portfolios, and aggressive action when appropriate. “*Why leave your money sitting in a fund when a buy and hold strategy is outdated?*”

For more information visit our website:
ACKERMANFG.COM