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“ FINANCIAL PLANNING IS NOT JUST ABOUT SAVING MONEY, IT’S ABOUT SAVING YOUR FUTURE. IT’S ABOUT CREATING A SAFETY NET, SECURING YOUR TOMORROW, AND BUILDING A LEGACY FOR THOSE WHO MATTER MOST.

JASON P. MARTINEZ, AIF®

WEALTH MANAGER

Jason is a dedicated and experienced wealth manager with a passion for helping clients achieve their financial goals. With over 15 years of experience in the financial industry, Jason has a deep understanding of investment strategies, financial planning, and risk management.

Known for his personalized approach, Jason works closely with each client to develop customized wealth management solutions that align with their unique financial objectives and aspirations. Whether it’s creating a retirement plan, managing investments, or optimizing tax strategies, Jason is committed to guiding clients through every step of their financial journey with patience, empathy, and expertise.

EDUCATION

B.A. Economics, University of Texas at San Antonio. Currently holds Financial Industry Regulatory Authority (FINRA) Series 7, 31, and 66 License and Registration. Maintains Texas Life and Health Insurance Licenses. Jason is an Accredited Investment Fiduciary® (AIF®).

SERVICE VALUE

With a strong background in finance and a reputation for integrity and professionalism, Jason is dedicated to building long-lasting relationships based on trust and mutual respect. By staying up to date on the latest market trends and industry developments, Jason empowers clients to make informed decisions and secure their financial future.

Outside of the office Jason enjoys volunteering in the community and educating others about financial literacy. He enjoys spending time with his family and participating in his local parish’s activities. As a wealth manager Jason is not just a financial professional but also a trusted partner who is always ready to lend a helping hand and provide guidance every step of the way.