

## JULIE JASON: A TRUSTED VOICE IN RETIREMENT INVESTING

A trusted voice in retirement investing, Julie Jason started her career on Wall Street as a lawyer after earning her advanced law degree from Columbia University. Her experience writing prospectuses and proxy statements helped her develop a critical eye and a taste for healthy skepticism.

Over the years, she has served as an arbitrator and an mediator for Finra, the regulatory body overseeing the financial services industry, and as a money manager focusing on the special needs of well-to-do families approaching retirement for Jackson, Grant Investment Advisers, Inc., a firm she co-founded twenty years ago.

As a financial columnist of 15 years, she approaches retirement topics with analytical fervor and fresh insights gained from her 30 plus years in the trenches. She is the author of six finance books including The AARP Retirement Survival Guide: How to Make Smart Financial Decisions in Good Times & Bad (*Sterling 2009*) and Managing Retirement Wealth: An Expert Guide to Personal Portfolio Management in Good Times & Bad (*Sterling 2011*), both recipients of the EIFLE award for Excellence in Financial Literacy Education (2011 and 2012).

Julie's focus on investor education extends to commenting on SEC rule proposals, some of which have been quoted by the SEC. Her articles on disclosure have appeared in peer-reviewed law and CPA publications (Trusts & Estates Magazine and the Journal of Accountancy). Her books and articles have received a number of awards for excellence in financial writing, including recognition by Booklist (American Library Association/ Top Ten Business Book) and the NY State Society of CPAs (excellence in financial journalism).

Over the years, Julie has addressed national (CNBC) and local TV (Chanel 12), radio (NPR), and in-person audiences on financial literacy and investment topics (AARP National Conventions 2011 and 2012). She has taught investment principles to members of the general public as well as attorneys and accountants for continuing education credit. She has participated in tax dialogues on a national level as the state of Connecticut's representative to the Taxpayer Advocacy Panel (TAP), a federal advisory committee to the IRS, receiving President Obama's Call to Service Award (2009) in recognition of more than 4,000 hours of TAP service.

Julie's biography appears in *Who's Who in the World*, *Who's Who in America*, *Who's Who in Finance and Industry*, *Who's Who in American Law*, *Who's Who of American Women*, and *Who's Who of Emerging Leaders*. Jackson, Grant is located at 2 High Ridge Park in

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