

## ABOUT RAYMOND JAMES

Registered Representatives at Dawson Wealth Management LLC offer securities through **Raymond James Financial Services, Inc.**



**RJFS** is a national financial services firm with approx-

imately 8,800 financial advisors located throughout the United States. The firm was founded in 1974 and is member of both the FINRA (*Financial Industry Regulatory Authority*) and SIPC (*Securities Investors Protection Corporation*). The parent company of **RJFS** is **Raymond James Financial Inc.**, (New York Stock Exchange symbol **RJF**), established in 1962 and a public company since 1983. Raymond James' subsidiaries provide a wide range of services to investors, including investment and financial planning; asset management; investment banking; and trust services. Their corporate headquarters are located in St. Petersburg, Florida. They have offices nationally and internationally.

### DAWSON WEALTH MANAGEMENT LLC

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1013 CENTRE ROAD, SUITE 228  
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Fax: 302-757-8008  
website: [www.dawsonwealth.com](http://www.dawsonwealth.com)

*Dawson Wealth Management LLC is a fee based financial solutions company established in 1985. Various associates at DWM are members of the following professional organizations:*

- ◆ The Investment Management Consultants Association
- ◆ The Society of Financial Service Professionals
- ◆ The Financial Planning Association
- ◆ The National Association of Insurance and Financial Advisors

## CONTACT US

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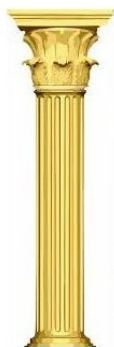
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## 39 YEARS

*Of Serving Clients*

1985 - 2024

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WEALTH  
MANAGEMENT LLC**

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**DAWSON WEALTH  
MANAGEMENT  
LLC**

*Dawson Wealth Management LLC is not a registered broker/dealer and is independent of Raymond James Financial Services, Inc. Member FINRA/SIPC*



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*Investment advisory services offered  
through Raymond James Financial Services  
Advisors, Inc.*

## ABOUT OUR COMPANY

*Financial Planning is a process...* At Dawson Wealth Management LLC, our advisors start the financial planning process with identifying and prioritizing your specific financial objectives. Together, we determine short- and long-term strategies that have the best potential for achieving your objectives. We can then either assist in the implementation of your plan or coordinate our efforts with other professionals of your choice. In either case, we review the progress you are making and periodically review and revise our recommended actions to provide you with a dynamic, up-to-date, and comprehensive plan designed to meet your unique needs. With over 100 years of combined experience in the financial services industry and a strong commitment to your success, the partners and staff at Dawson Wealth Management LLC are ready to provide you with the professional expertise and objectivity that will help invest, manage, and conserve your wealth. It is important to us that our clients are comfortable with each step of establishing their goals and implementing their financial plans. With this in mind, we have built our company with a philosophy of old fashioned service and satisfaction, striving to provide our clients with the highest level of service possible.



Visit us online at  
[www.dawsonwealth.com](http://www.dawsonwealth.com)

## OUR ADVISORS OFFER

### Investment services:

- ◆ Stocks
- ◆ Bonds / CD's
- ◆ ETF's
- ◆ Sustainable Investing / ESG
- ◆ Mutual Funds
- ◆ 529 Plans
- ◆ Private Portfolio Management
- ◆ Asset Allocation

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### Retirement planning:

- ◆ Date Selection
- ◆ Retirement Income Analysis
- ◆ Lump Sum Distribution Analysis
- ◆ Rollover Education
- ◆ Monte Carlo Simulation

-At DWM LLC you will enjoy independent unbiased service from advisors who are experienced credentialed professionals.

### Tax management planning:

- ◆ Tax Planning
- ◆ Cash Management
- ◆ Executive Compensation
- ◆ Planning Including:  
Stock Option Analysis and/or Incentive Compensation
- ◆ Stock Concentration Diversification

### Insurance services:

- ◆ Life Insurance
- ◆ Disability Insurance
- ◆ Annuities
- ◆ Long-Term Care Insurance
- ◆ Hybrid Policies

*Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.*

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