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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

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41 YEARS
Of Serving Clients
1985 - 2026
DAWSON
WEALTH
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Forbes
2026
BEST-IN-STATE WEALTH MANAGEMENT TEAMS
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2026 Forbes Bet-in-State-Wealth Management Teams
The 2026 Forbes ranking of America's Best-In-State Wealth Management Teams, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 3/31/2024 to 3/31/2025 and was released on 01/07/2026. Advisor teams that are considered must have one advisor with a minimum of seven years of experience, have been in existence as a team for at least one year, have at least 5 team members, and have been nominated by their firm. The algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 12,787 team nominations, 6,149 advisor teams received the award based on thresholds. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Compensation provided for using the rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please see https://www.forbes.com/lists/wealth-management-teams-best-in-state for more info.

Apr 2026

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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

OUR ADVISORS OFFER

Investment services:

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

Securities offered through
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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

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