

About the Author

Julie Jason, JD, LLM

Julie Jason began her Wall Street career as a securities lawyer (Assistant General Counsel for a major broker-dealer) and executive (president of the firm's managed futures subsidiary and of its trust company). In 1992, she founded Jackson, Grant Investment Advisers, Inc. of Stamford, CT, as an independent fiduciary stand-alone investment adviser. The firm specializes in managing retirement portfolios for high-net-worth and ultra-high-net-worth families.

Julie has the unique experience of having worked under two regulatory environments: on Wall Street with a registered broker-dealer regulated by the 1934 Act and on Main Street with a registered investment adviser regulated by the Advisers Act.

A long-time advocate for financial literacy education, her award-winning books and columns are referenced at www.juliejason.com. Her work has received recognition for clarity, accuracy and excellence in financial literacy education. As a volunteer, for three years she served as the representative of the state of Connecticut before the Taxpayer Advocacy Panel, the federal advisory committee to the IRS, earning President Obama's Call to Service Award. She and her family reside in Greenwich, Connecticut. Her biography is published in *Who's Who in American Law*, *Who's Who in America*, and *Who's Who in the World*.