3636 Nobel Drive, Suite 440
San Diego, CA 92122-1042
Phone: (858) 455-1825
Fax: (858) 455-6211
Web Site: www.asset-preservation.com

John L. Jenkins, AEP, EA, CFP®

President and CEO

A third generation San Diego native, John has been a financial professional since 1982. Although he originally studied to be a school teacher, he quickly found his calling in educating people for financial well-being and helping them achieve it.

John holds BA and MA degrees from San Diego State University. He developed a strong financial foundation by pursuing several professional certifications and designations. In 1985, he completed his Certified Financial Planner™ professional studies through the College for Financial Planning in Denver and was admitted to the Directory of CFP Practitioners in 1993. John also holds a Masters Degree in Wealth Strategies Planning from the Estate and Wealth Strategies Institute at Michigan State University and is endowed as a full Fellow of the Esperti Peterson Institute. In addition, he is a Certified Agent for the California Partnership for Long Term Care and an Enrolled Agent (EA), having successfully passed the exam administered by the Internal Revenue Service.

Maintaining his love for teaching, John has conducted numerous financial planning workshops during his career. He has been a guest on the PBS show "The Money Makers" and its successor, "The Financial Advisors," as well as the syndicated news magazine show "Heartbeat of the City." He has also authored and co-authored several books and publications.

John was an Adjunct Faculty member of the National Endowment for Financial Education in Denver and is recognized in both "Who's Who in California" and "Who's Who in Finance." He completed five years of service on the Board of Directors of the San Diego Chapter of the Financial Planning Association (FPA) and is currently serving on the Board of the San Diego Estate Planning Council and as a member of the Estates and Trusts Committee for Rady Children's Hospital Foundation.

John is frequently quoted in the financial press, including Financial Planning News, The San Diego Union-Tribune, the La Jolla Light and the San Diego Business Journal. He is a member of the Financial Planning Association, The CA Society of Tax Consultants and the Estate Planning Council of San Diego. John has been named for three years in a row as a 5 Star, Best in Client Satisfaction Wealth Manager by San Diego Magazine based on surveys of more than 30,000 clients of wealth mangers and data from more than 4,000 financial service professionals.

John is the proud father of four children and a grandfather to one granddaughter. His close-knit family members all reside in San Diego County. In his spare time John plays guitar and sings, on occasion professionally. He enjoys movies, cycling and culinary pursuits. He volunteers at his church in the multimedia ministry.

Areas of Expertise

- Collaborative Wealth Management
- Consultative Financial Planning
- Insurance Planning & Risk Management
- Alternative Investments & Real Estate
- College Funding
- Business Succession Planning

Education/Certification

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®)
- Certified Agent for the California Partnership for Long Term Care (AEP)
- Enrolled Agent (EA)
- BA and MA; San Diego State University

Affiliations

- Current Board Member, San Diego Estate Planning Council
- Member, Estates and Trusts Committee for Rady Children's Hospital Foundation
- Member, CA Society of Tax Consultants
- Former Adjunct Faculty Member, National Endowment for Financial Education
- Who's Who in California
- Who's Who in Finance

Media Resource

- PBS – "The Money Makers" and "The Financial Advisors"
- "Heartbeat of the City"
- Financial Planning News
- San Diego Union-Tribune
- La Jolla Light
- San Diego Business Journal
- Author