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JGP Wealth Management, LLC Launches as an Independent Registered Investment Advisor

Firm Based in Portland, Oregon Offers Comprehensive and Customized Wealth Management Solutions

PORTLAND, OR, March 12, 2018 – JGP Wealth Management, LLC, an independent Registered Investment Advisor (RIA) headquartered in Portland, OR, is announcing its launch. The firm will continue to serve a select group of affluent families around the United States.

The partners at JGP started working together over 24 years ago. "We are the same exceptional team, with the same mission of taking care of our clients, and now with a charge and the opportunity to put their interests ahead of all others," said Kevin Sanger, COO and Director of Advice & Implementation.

"As we explored the numerous options for serving clients, we realized that the independent Registered Investment Advisor platform holds an advantage. This is an era of transparency, collaborative technology, vast investment options, and customized solutions. We concluded that nimble advisory teams, like JGP, with best in class strategic partners provided the best approach for serving clients," said Jeff Paustian, CEO.

JGP Wealth Management has formed strategic relationships with some of the leading providers in the industry, including Fidelity Clearing & Custody Solutions® who will act as the primary custodian for client investment assets.

"We look forward to working with the team at JGP Wealth Management as they strive to take their firm to the next level," said David Canter, head of the RIA segment for Fidelity Clearing & Custody Solutions. "JGP's client-focused approach and innovative thinking will be key to their success as a 'future-ready' firm, and I'm excited to welcome them as they begin that journey."

JGP will also use eMoney Advisor financial planning software to continue to deliver consistent, timely financial advice to its clients. "The technology and collaborative tools available in the independent RIA space are years ahead of much of the industry, and we are excited about harnessing that to bring customized solutions to our clients," said Senior Financial Advisor Joe Gross.

About JGP Wealth Management, LLC

JGP Wealth Management provides comprehensive financial solutions to a select group of affluent families and C-suite executives around the United States. JGP's core principle is that every sound decision is rooted in confidence, whether to advance a career, make lifestyle choices or manage wealth. Through a proprietary three-tier service matrix and a seven step client assessment process, JGP instills confidence for every one of its clients. For more information, please visit www.jgpwealth.com

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