NORTHWEST FINANCIAL ADVISORS

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MEET JONATHAN.

A TRUSTED MEMBER OF YOUR NWFA WEALTH MANAGEMENT TEAM.

With over 20 years of experience in the investment and financial planning fields, Jonathan is a Financial Advisor for Northwest Financial Advisors. Through his affiliation with LPL Financial, the nation's largest independent broker-dealer,* Jonathan provides comprehensive financial and investment consultation to a wide range of clients seeking multiple levels of financial planning, including retirement income planning, estate and wealth transfer planning, insurance and liability protection planning, and tax-efficient investment planning.

Jonathan works directly in the ongoing management and monitoring of client investment portfolios, and his direct involvement in client consultation manages portfolio design based on the unique needs of each client.

He is a graduate of the University of Virginia and holds a Master of Business Administration degree (Finance and Investments) from The George Washington University. He also earned the Chartered Financial Consultant (ChFC®) and Retirement Income Certified Professional (RICP®) designations from The American College, Bryn Mawr, Pennsylvania. He is a former U.S. Marine Corps officer and member of the Washington Association of Money Managers.

Prior to joining Northwest Financial Advisors, Jonathan was Senior Vice President of Investments for a regional financial consulting firm. In that capacity, Jonathan oversaw all investment aspects of the firm, to include due diligence, advanced case design, training and operations.

Jonathan lives in Arlington, Virginia with his wife and two sons. He enjoys hiking, baseball and getting outdoors.

Contact Jonathan at **jadams@nwfllc.com** or **(703) 810-1072 x101**.

* As reported in *Financial Planning* magazine, June 1996-2017, based on total revenue.