Jeffrey P. Carlson, CFP®, ChFC®, CLU®
PARTNER / WEALTH MANAGEMENT ADVISOR

Jeff Carlson is a Founding Partner of Apollon Wealth Management, a collaborative and transparent financial planning firm focused on aligning client's goals of growing and preserving their hard-earned wealth. Jeff's years of industry expertise in risk-based planning helps clients magnify and protect their legacy, optimize tax efficiency and mitigate risk. In his nearly 20-year career, Jeff has successfully achieved more than $2 Billion in business through customized financial protection for families and corporations.

A notable and respected expert in the field, Jeff has found that one of the most mismanaged components of one's financial wealth is life insurance. His understanding of his client's long-term objectives, tax situation and risk tolerance makes him a standout within Apollon's business structure. The independence afforded to Apollon advisors gives them ownership of the firm's core values, and an open architectural environment further allows them the freedom to design solutions to safeguard and grow client's assets.

Before establishing Apollon Wealth Management in 2018, Jeff served as Principal/Wealth Management Advisor of Carlson & Associates/Northwestern Mutual for 17 years. During his tenure, Jeff was a perennial Forum qualifier representing the top 2% of advisors nationally in the firm and broke the record for the Youngest Producer for the company at the age of 24. Jeff is a member of the Million Dollar Round Table and a Qualifying/Life Member since 2001. He has been Court of the Table since 2006 and Top of the Table in 2011 and 2018. Other accolades include the NAIFA Quality Award and the "40 Under 40 Award" (*Charlotte Business Journal)*.

Jeff graduated from University of Kansas with a B.S. in Business Administration. Continuing to deliver on his commitment to help his clients achieve financial security, Jeff has earned his CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. In addition, he also holds the Chartered Life Underwriter (CLU®) and Chartered Financial Consultant (ChFC®) titles. Jeff maintains his insurance and securities licenses, serving his clients throughout the country (FINRA Licenses: Series 6, 7, 63, 66).

Jeff is deeply involved in the Charlotte community and is a supporter of the Betty Ann Moore Colon Cancer Awareness Fund, Pat's Place Child Advocacy Center, the Charlotte Symphony and Mint Museum. He resides in Charlotte, North Carolina with his wife, Anne Brady, and their three daughters: Annie Mac, Elle and Mary Pen.