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“The Discerning Investor” Wins 2023 EIFLE Book of the Year Award for Investing & Retirement Planning

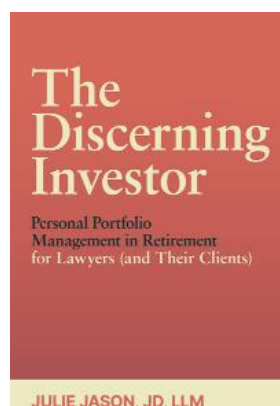
**A Must Read - “A *vital* resource for lawyers and their clients,”
according to Rachel Gordon, executive director of the Institute for Financial Literacy**

The American Bar Association publication becomes the record fourth consecutive book by author Julie Jason, “the trusted voice of retirement investing,” to win an EIFLE Award

STAMFORD, Conn., June 20, 2023— *The Discerning Investor: Personal Portfolio Management in Retirement for Lawyers (and Their Clients)* is the recipient of the 2023 Excellence in Financial Literacy Education (EIFLE) Award for Adults’ Book of the Year: Investing & Retirement Planning. Written by investment counsel and financial literacy proponent, Julie Jason, JD, LL.M., the book is an American Bar Association publication.

“We are pleased and excited that author Julie Jason has received the 2023 EIFLE book award for *The Discerning Investor*,” said Donna Gollmer, director of ABA Publishing. “Ms. Jason has poured all of her remarkable and discerning investment expertise and experience into this book with the welcome goal of preparing each of us for retirement on our own terms. Ms. Jason’s analysis and guidance help us to foresee and manage the many risks and uncertainties that impact our lives and the financial markets along retirement’s journey, and she captures this brilliantly in brief and clear chapters that illuminate the essentials and respect the reader’s time.”

Ms. Jason is the first author in the history of the EIFLE to receive the coveted honor for four consecutive books, explained Rachel Gordon, executive director of the Institute for Financial Literacy. The Institute for Financial Literacy established the EIFLE Awards in 2007.



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“Since her first EIFLE in 2010, it has been our pleasure to acknowledge Ms. Jason's ongoing commitment to financial literacy education, establishing her as the trusted voice of retirement investing,” said Ms. Gordon.

The Discerning Investor focuses on the importance of lawyers and their clients in preparing for the move into retirement, a venture that they have not previously experienced. Without proper training and preparation, the transition is fraught with potential traps, landmines, and even simple, avoidable missteps.

“My goal in writing this book is to address openly the inevitable choices the reader will face for the first time in this, the riskiest period in an investment life cycle,” explained Ms. Jason. “This is the time when lawyers will be called upon to make decisions that they have never made before. Ambiguity, conflicts of interest in financial services, and uncertainty all need to be understood and self-awareness developed before an effective retirement program can be created.”

Ms. Jason shares her decades of experience working with lawyers and others to help readers create a clear path to peace of mind in a retirement that can last decades. She reviews key information about the markets, risk, structuring income-generating portfolios, and the new regulatory framework governing investment advisers and brokers that explains standards of conduct and the importance of identifying conflicts of interest.

“Attorneys and other professionals may define themselves by their careers,” said Ms. Jason. “They may not see how the future might unfold, including how they will support themselves after the paycheck stops. And, for the first time in their careers, they are moving into a risky transition, where they don’t know what they don’t know.”

Ms. Jason “has delivered another essential guide for retirement planning,” said Ms. Gordon, calling the book “a *vital* resource for lawyers and their clients.”

Ms. Jason received her first EIFLE Award in 2010 for “The AARP Retirement Survival Guide: How to Make Smart Financial Decisions in Good Times and Bad” (Sterling Publishers, 2009). The book was updated and revised as the “Retirement Survival Guide” (Sterling Publishers) in 2017. In 2012, Ms. Jason earned her second EIFLE with “Managing Retirement Wealth: An Expert Guide to Personal Portfolio Management in Good Times and Bad” (Sterling Publishers, 2011). In 2019, she was recognized with her third EIFLE for “Retire Securely: Insights on Money Management from an Award-Winning Financial Columnist” (Sterling Publishers, 2018).

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Background on Julie Jason and Jackson, Grant

Jackson, Grant Investment Advisers, Inc., founded by Julie Jason, JD, LLM, is a fiduciary only-and-always "investment counsel" boutique with a 30-year history. Her team manages personal portfolios for high-net-worth and ultra-high-net-worth families, working with CPAs and lawyers to integrate financial and estate plans for the firm's clientele. The firm is SEC-registered, with offices in Stamford, Conn.

<https://jacksongrant.us/>

Ms. Jason developed her views on financial services over a lifelong career in law and management, starting out on Wall Street as a lawyer. She has been a proponent of financial literacy and retirement finance education since 1996 with the publication of her first book, "You and Your 401(k): How to Manage Your 401(k) for Maximum Returns" (Simon & Schuster). Through her award-winning weekly investor education column (syndicated by Andrews McMeel Syndication), Ms. Jason troubleshoots financial problems for a broad audience of readers of every financial means. Her award-winning books and columns have been recognized for excellence in financial literacy education and accuracy in reporting. <https://juliejason.com>

For Ms. Jason's current virtual CLE lectures, see the ABA's Recognize and Avoid Conflicts of Interest Before Referring a Financial Adviser to Clients; Lawline's SEC Disclosure Tool (Form CRS) Helps Attorneys With Their Due Diligence When Referring a Financial Adviser to a Client; and the National Academy of Continuing Legal Education's Form CRS: Practical Considerations for Attorneys all available on Jackson, Grant Investment Advisers, Inc. (<https://tinyurl.com/JGCLE1>).

Hear Ms. Jason talk about *The Discerning Investor* and read a free chapter of the book at <https://tinyurl.com/JGCLE1>. The book is now available on Amazon.com.

About the Excellence in Financial Literacy Education (EIFLE) Awards

The mission of the EIFLE Awards is to promote the effective delivery of consumer financial products, services and education by acknowledging the accomplishments of those that advance financial literacy education. Each year, the Institute for Financial Literacy presents the EIFLE Awards to individuals and organizations that have shown exceptional innovation, dedication and commitment to the field of financial literacy education.

About the Institute for Financial Literacy

The Institute for Financial Literacy is a nonprofit 501(c)(3) tax-exempt organization whose mission is to promote effective financial education and counseling. As a national authority on adult financial education, the Institute advances professionalism and effectiveness in the field of financial literacy by hosting the Annual Conference on Financial Education™, presenting the Excellence In Financial Literacy Education (EIFLE)™ Awards, and administering certifications through Fincert.org™.