



MASON JONES, CFP®

Advisor

ABOUT

Mason served four years in the Marine Corps Infantry; completing two tours of duty in Iraq. He served our country with honor, courage and commitment, qualities he continues to demonstrate as an Advisor for his clients here at John G. Ullman & Associates, Inc.

Mason exhibits the highest of standards as an experienced and knowledgeable financial advisor; ready to advocate for your family's financial future. He earned a degree in Financial Planning from State University of New York, College of Technology at Alfred, and is also a CERTIFIED FINANCIAL PLANNER™

As a JGUA financial advisor, one of Mason's most important roles is to assist clients in accomplishing the most out of their financial lives by way of proactivity and education.

In essence, he will "diagnose before prescribing" ensuring the client understands the problem before effectively addressing the solution. By way of directed advocacy, Mason's goal is to guide clients through the entire process by conducting research, setting goals, and offering solutions. He continues the process through implementation and continually monitors the client's plan into the future.

CONCENTRATIONS


Financial Planning
Employee Benefits
Insurance
Investment
Retirement
Tax




John G. Ullman
& Associates, Inc.


COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978

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EDUCATION

State University of New
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BBA in Financial Planning

Certified Financial
Planner (CFP®)