

# JONATHAN M. OWENS

FINANCIAL ADVISOR  
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Many large corporations currently have a CFO to help them manage their company's money and risks. Are you currently working with someone who will act in your interest too?

Jonathan (Jon) Owens specializes in retirement solutions and understands there are many challenges people face when planning for their financial future. Earning income, saving for retirement, planning for future events, and managing the risks that life may bring all need to be considered. Jon provides financial guidance to emerging wealth individuals and couples, established families and growing privately held businesses in the following ways:

- Investment Management Strategies
- Life Insurance and Disability Income Planning
- Long Term Care Planning
- Business Succession, Executive Compensation and Retirement Plans
- Legacy & Charitable Giving Strategies
- Comprehensive Financial Planning

## THE BUSINESS PLANNING GROUP

12901 SE 97<sup>th</sup> Avenue  
Suite 100  
Clackamas, OR 97015  
(503) 654-7676

### Education

BS in Business, Linfield College '06

### Community

Linfield College President's Circle Leadership Team  
Member of NAIFA, Portland, Oregon

### Achievements

2011 FIVE STAR Wealth Manager- Portland Monthly\*  
Million Dollar Round Table Qualifier  
JHFN ACE (Achieve Client Excellence) Recognition Meeting Qualifier  
Fidelity Advisor Council  
2009 New Associate of the Year, Boston Partners Financial Group

### Licenses

Life/Health/Long Term Care Insurance  
Series 6: Investment Company Products/ Variable Contract Limited Representative  
Series 7: General Securities Representative  
Series 63: Uniform Securities Agent State Law  
Series 65: Uniform Investment Advisor

\*The FIVE STAR Award is a client services award issued by Crescendo Business Services, based on an overall evaluation score of a wealth manager that reflects an average of all respondents and may not be representative of any ne client's experience. The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or magazine.