

**Paul Brian Jackson, CFA, CIPM**

**CRD# 2657314**

**Lifestyle Asset Management, Inc.**

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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Paul B. Jackson that supplements the Lifestyle Asset Management, Inc. brochure. You should have received a copy of that brochure. Please contact 281-612-2035 if you did not receive Lifestyle Asset Management, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Paul B. Jackson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

**Paul Brian Jackson, CFA, CIPM, AIF**

**Year of Birth:** 1968

### **Formal Education after High School:**

- Sam Houston State University, Bachelors, Finance, 1993 to 1995
- University of Houston, Masters, Finance, 1997-2000

### **Business Background:**

- Lifestyle Asset Management, Inc. (formerly Centurion Advisors Corp.), President, 07/2011 to 01/2017, Investment Adviser Representative/Chief Compliance Officer, 07/2011 - Present
- LifeStyle Financial Advisors, Investment Committee Member, 4/2016 to Present
- Sowell Management Services, Senior Vice President /Investments 04/2009 to 07/2011
- SHIELDadvisors Corp., President & CCO, 01/2003 to 03/2009
- FFP Securities, Registered Representative, 11/2003 to 7/2007

### **Certifications:**

- **The Chartered Financial Analyst (CFA), 2003.**

The CFA and Certification Mark (collectively, the "CFA marks") are professional certification marks granted in the United States and internationally by the CFA Institute. The designation is a qualification for finance and investment professionals, particularly in the fields of investment management and financial analysis of securities and their derivatives.

Use of the CFA Marks signifies that an individual has earned the CFA charter. To earn a CFA charter, a charter holder must have four years of qualified investment work experience, be a member of the CFA Institute, apply for membership to a local CFA membership society, pledge adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct and complete the CFA program.

The CFA program is organized at three levels, with each level culminating in a comprehensive examination. A candidate for the CFA charter must pass the examinations at each of these levels, successively.

CFA Institute members and CFA program candidates must:

- Act with integrity, competence, diligence, respect and in an ethical manner with the public, colleagues in the investment profession and other participants in the capital markets.
- Place the integrity of the investment profession and interests of clients above their personal interests.
- Use reasonable care and exercise independent professional judgment when conducting investment analysis, making investment recommendations, taking investment actions and engaging in professional activities.
- Practice and encourage others to practice in a professional and ethical manner.
- Promote the integrity of the capital markets and uphold the rules governing the capital markets.
- Maintain and improve their professional competence.

- **Accredited Investment Fiduciary (AIF), 2012.**

The AIF designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF Code of Ethics. In order to maintain the AIF designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

- **The Certificate in Investment Performance Measurement (CIPM), 2011.**

The CIPM credential, administered by the CFA Institute, is the investment industry's only designation dedicated to investment performance analysis and presentation. It is the premier mark of distinction for professionals seeking to increase their mastery of performance measurement principles. The CIPM program applies best practices in investment analysis techniques and tests proficiency in professional ethics, performance evaluation, and investment reporting.

To earn the CIPM certificate, a candidate must enroll and pass two exams, become a regular member of the CIPM Association, and meet professional experience requirements.

Both the Principles and the Expert exams test the following concepts:

- Ethical and professional standards
- Performance measurement, attribution, and appraisal
- The Global Investment Performance Standards (GIPS)

The Principles level emphasizes the conceptual foundations of performance measurement, attribution, and appraisal as well as the provisions of the GIPS standards. The Expert level emphasizes performance evaluation and presentation, including application of the appropriate tools and inputs in more complex situations and the GIPS Guidance Statements.

### **Item 3 Disciplinary Information**

Mr. Jackson does not have any reportable disciplinary disclosure.

### **Item 4 Other Business Activities**

Paul Jackson is an Investment Committee member of LifeStyle Financial Advisors, a financial consulting firm. Mr. Jackson's duties as the Investment Committee member of LifeStyle Financial Advisors do not create a conflict of interest to his provision of advisory services through Lifestyle Asset Management, Inc.

### **Item 5 Additional Compensation**

Refer to the *Other Business Activities* section above for disclosures on Mr. Jackson's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Lifestyle Asset Management, Inc.'s firm brochure for additional disclosures on this topic.

## **Item 6 Supervision**

Michael Allen Wegner, President of Lifestyle Asset Management, Inc. is responsible for supervising the advisory activities of Mr. Jackson. You may contact Mr. Wegner at 281-612-2035.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Lifestyle Asset Management, Inc., and by internal decisions as to the types of investments that may be included in client portfolios. Lifestyle Asset Management, Inc. conducts periodic reviews of client holdings and documented client information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.