



Woodson Wealth Management

Primary Office Location:
17048 Handlebar Road
Ramona, CA 92065

Secondary Office Location:
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Dated January 11, 2021

Form ADV Part 2B – Brochure Supplement

For

Jamie Michael Lima 5138442

President/Founder, and Chief Compliance Officer

This brochure supplement provides information about Jamie Michael Lima that supplements the Woodson Wealth Management (“WWM”) brochure. A copy of that brochure precedes this supplement. Please contact Jamie Michael Lima if the WWM brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Jamie Michael Lima is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 5138442.

Item 2: Educational Background and Business Experience

Jamie Michael Lima

Born: 1977

Educational Background

- 2011 – Master of Business Administration, National University
- 2008 – MS/Finance, University of Phoenix

Business Experience

- 04/2020 – Present, Woodson Wealth Management, President/Founder and CCO
- 02/2020 – 04/2020, Presidio Capital Management, Wealth Advisor
- 04/2017 – 02/2020, Fidelity Investments, VP Financial Consultant
- 11/2015 – 04/2017, Fidelity Investments, VP Regional Planning Consultant
- 07/2011 – 11/2015, Fidelity Investments, VP Financial Consultant
- 07/2006 – 07/2011, Morgan Stanley, Financial Advisor

Professional Designations, Licensing & Exams

CFP (Certified Financial Planner)®: The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with Clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and Client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real-world circumstances;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.
Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:
 - Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
 - Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*.
The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their Clients.
CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3: Disciplinary Information

No management person at Woodson Wealth Management has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Jamie Michael Lima is the Member/Owner at Two Wishes, LLC DBA Two Wishes Homestead. This activity is generally not performed during trading hours.

Jamie Michael Lima provides consulting services to Emissary. This activity is generally not performed during trading hours.

Item 5: Additional Compensation

Jamie Michael Lima does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through WWM.

Item 6: Supervision

Jamie Michael Lima, as President/Founder and Chief Compliance Officer of WWM, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

Item 7: Requirements for State Registered Advisers

Jamie Michael Lima has NOT been involved in an arbitration, civil proceeding, self-regulatory proceeding, administrative proceeding, or a bankruptcy petition.