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## NEWS

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# **FIVE STAR: Best in Client Satisfaction Wealth Managers (SM) Announced**

## *San Diego Advisor Named for Third Consecutive Year*

SAN DIEGO, CA (December 10, 2008) – Long-time financial professional and president of Asset Preservation Strategies, Inc., John Jenkins, has been named to the 2009 FIVE STAR: Best in Client Satisfaction Wealth Managers <sup>(SM)</sup> list for the third year in a row. The complete list will appear in the February 2009 issue of *San Diego Magazine*.

*San Diego Magazine* formed a partnership with Crescendo Business Services, an independent research firm, to identify the "best in client satisfaction" wealth managers serving the San Diego area. In February, Crescendo surveyed, by mail and phone 95,000 high-net-worth residents in the San Diego area and subscribers of *San Diego Magazine*. An additional 9,000 surveys were sent to leaders of financial service industry companies.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale-service, quality of recommendations and overall satisfaction.

By March, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

The resulting list of 2008 FIVE STAR Wealth Managers is an elite group, representing less than 3 percent of the wealth managers in the San Diego area.

### **About John Jenkins and Asset Preservation Strategies, Inc.**

John Jenkins is president and founder of San Diego-based Asset Preservation Strategies, Inc., which provides a team of financial professionals collaborating to address all of the elements of successful wealth management. A third generation San Diego native, John has been a financial professional since 1982. Although he originally studied to be a school teacher, he quickly found his calling in educating people for financial well-being and helping them achieve it.

John holds BA and MA degrees from San Diego State University. He developed a strong financial foundation by pursuing several professional certifications and designations. In 1985, he completed his Certified Financial Planner™ professional studies through the College for Financial Planning in Denver and was admitted to the Directory of CFP Practitioners in 1993. John also holds a Masters Degree in Wealth Strategies Planning from the Estate and Wealth Strategies Institute at Michigan State University and is endowed as a full Fellow of the Esperti Peterson Institute. In addition, he is a Certified Agent for the California Partnership for Long Term Care and an Enrolled Agent (EA), having successfully passed the exam administered by the Internal Revenue Service.

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### **Research Declarations:**

As with any research or recognition program, it is important that we provide you the following declarations:

- The 2008 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR Best in the Client Satisfaction Wealth Managers.
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth manager's future performance.
- 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 *San Diego Magazine*.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to the future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: [www.fivestarprofessional.com/wmresearch](http://www.fivestarprofessional.com/wmresearch).

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