Jason M. Bozard

Investment Advisor Representative

THE FRIEDEN AGENCY

Service with Integrity
Since 1928

Personal Financial Analysis

Investment Services

Executive Compensation Strategies

- Split-dollar
- Reverse split-dollar
- Executive Bonus
- Deferred Compensation

Retirement Services

- IRA
- Simple IRA
- 401(k) (inc. Safe Harbor)
- 403b

Business Continuation Strategies

- Buy Sell Funding
- Key Person Insurance

Employee Benefit Services

- Group Health
- Life
- Disability
- Group Dental

Estate Conservation Strategies

Estate Analysis

- Survivorship Life Insurance
- Charitable Giving

Long Term Care Insurance

The Frieden Agency
277 Bendix Rd., Suite 500
Virginia Beach, Virginia 23452
757-531-7496 (direct)
757-340-9777 ext. 326
jbozard@friedenwealth.com

Mission:

After graduating from Virginia Tech in 1998, Jason Bozard began pursuing his vision of becoming an entrepreneur who would be able to assist individuals and businesses in achieving their financial goals. Since the age of 22, he has played a key role in taking care of his father who needed both physical and financial care. Because of this, Jason understands the importance of developing a financial strategy for the future as well as the unexpected. Now, with a family of his own, Jason has become even more focused on his vision.

His mission is to combine his experience at The Frieden Agency with his passion and education in order to help individuals and businesses reach their goals.

Education:
Graduate of Virginia Polytechnic Institute & State University, Bachelors in Business Management, December of 1998
BB&T Management Development Program, August 1999

Community Involvement:
United Way Young Leaders Society
NYSL Youth Soccer
VBLL Board Member and Coach
Equi-Kids
March of Dimes

Our mission is to value your ***Goals*** *and protect your* ***Needs*** *through our professional* ***Guidance****.*

FRIEDEN WEALTH MANAGEMENT
YOUR GOALS. YOUR NEEDS. OUR GUIDANCE.

THE FRIEDEN AGENCY
SERVICE WITH INTEGRITY SINCE 1928
INSURANCE | INVESTMENTS | EMPLOYEE BENEFITS