

Joshua H. Jasien, CFP®

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PROFESSIONAL SUMMARY

I bring an entrepreneurial approach to building and scaling business—identifying opportunities, creating demand, and executing strategies that deliver measurable growth. I specialize in structured notes, annuities, and exchange funds, helping advisors translate complex investment solutions into clear value for their clients. My focus is on accelerating sales outcomes through high-impact education, targeted marketing, and consultative partnership.

Known for developing strong, trust-driven relationships, I work closely with investment advisors to uncover new revenue opportunities and build more efficient, scalable practices. I'm also committed to developing people—mentoring team members, fostering a performance-driven culture, and empowering others to think like owners.

HONORS AND AWARDS

- Specialist of the Year - Merrill 2024
- Specialist of the Year - Merrill 2018
- Highest Percent to Goal - Merrill 2017
- Wholesaler of the Year - Jackson 2014
- Wholesaler of the Quarter, Jackson Q2 2014
- Wholesaler of the Quarter, Jackson Q4 2012

FINANCE EXPERIENCE

Bank of America - Merrill Lynch

Vice President – Capital Markets and Structured Notes

Nov. 2022 - Present

- Drove divisional production from \$900M → \$1.5B in 24 months through strategic territory planning and multi-product positioning.
- Lead distribution for structured notes, providing high-level guidance on concentrated stock and exchange fund strategies for HNW clients.

Vice President – Retirement and Annuity

April 2015 – Nov. 2022

- Scaled retirement and annuity sales by 150% (\$80M → \$200M) through advisor education and strategic territory expansion.
- Drove consistent production growth by implementing consultative business-building strategies and increasing product adoption across the division.

Jackson National Life Distributors

Business Development Consultant - Hybrid Wholesaler

Jan. 2012 – April 2015

- Wholesaled Variable Annuities in the Regional Broker Dealer and Wirehouse channels.

CERTIFICATIONS & EDUCATION

Certified Financial Planner®, Certified Annuity Specialist®,
Certified Fund Specialist®, Certified Income Specialist™,
FINRA Series 66, Series 63, Series 24, Series 7, TX General
Lines Insurance – Life, Accident, Health

Texas A&M University 2007,
Bachelor of Science in Economics,
Minor in Business Administration