



Jason D. Nickerson, CFP[®], EA

**Account Executive
Vice President, Tax Services**

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Whether creating a stock option plan for a client or working with an individual on personal financial goals, Jason takes pride in the firm's focus on people — a value to which he is equally committed.

Credentials

- Salisbury State University,
BS Finance
- Corning Community College,
AS Business Administration
- Certified Financial Planner[®]
- Enrolled Agent

Community Service

- Gaffer District Finance Committee

Background

Jason is analytical, rigorous, organized and detail oriented. These key qualities teamed with his warm friendly style make him a highly valued member of the Ullman team. Jason started with John G. Ullman & Associates, Inc. in 1998, taking on increasing levels of responsibility each year. Jason never shies away from a challenge. As parent of twins, he is used to hard work and long hours.

Areas of Expertise

- Stock Option Planning
- Tax Planning
- Asset Allocation
- Retirement Planning
- Survivorship
Analysis
- Education
Planning

