Lifelong Wealth Management Group

Understanding it. Committing to it. Living it.

Jason Gong formed Lifelong Wealth Management Group with a mission to help others identify and understand their "why" while simultaneously satisfying his own: to help individuals and families pursue their life goals.

"The moment we define ourselves and our values by the size of our bank accounts is when we start to describe ourselves by the shadows that walk behind us," explains Gong. "All too often, we work all our lives in the hopes to one day live our dreams, only to realize that we spent most of our lives not knowing what our dreams are."

Gong decided to go out on his own eight years ago after working in the private realm where companies seemed to have no alignment to client interests. "I recognized what was going on in the industry," he says, "The financial landscape was changing rapidly, while people were confused about how it was impacting their own situation. The world had changed significantly, while financial professionals were not necessarily changing their approach."

So, Gong developed his proprietary approach based on the acronym WISDOM—Why, Investment, Save, Diversify, Open Architecture, and Manage.

Wisdom encompasses taking into account a person's what, why, and when. What drives a person fundamentally, beyond finances, becomes their **Why**. How they visualize it and when they want it to happen, helps dictate the **Investment** strategy. Once this is understood, it is time to **Save** appropriately to meet overall goals and **Diversify** in order to build and manage risk. Looking at this with an **Open Architecture** mindset allows Gong to help with anything from insurance and investments to mortgages and taxes, which all contribute to the overall plan. Finally, it is critical to **Manage** the overall process.

Gong feels strongly that, in order for people to fulfill their personal why, a person/family needs both the wealth management and the human factor components incorporated into a financial strategy. This is the key differentiator for Lifelong Wealth Management Group. This human-centered approach may be why Gong attracts an eclectic portfolio of investors, from millennial and retirees to independent business owners, doctors, and corporate executives. Gong also serves as chair for Northwest Spine Foundation, which promotes spine research and education.

According to Gong, there is no magic formula for personal financial success. It entails financial discipline in diversification, process, and hard work. His formula for financial wealth management relies on three key components: Process, Platform, and People. "Anyone can make better hamburgers than McDonalds. But why are they a multi-billion dollar company? Because they have a process that leads to consistent outcomes and experiences," he explains. "Financial management is similar. You need to put a process in place to assure an outcome." An open Platform allows Gong and his team to think outside the box. "We don't limit ourselves to only insurance, stocks and/or bonds, but encourage clients to be open to other opportunities, such as buying property or investing in a business," he explains. Finally, the People are the final critical component. He adds, "You must have the appropriate partnerships with key experts in their fields."

"At the end of the day, it all comes back to why. I stopped measuring performance of a portfolio, and instead started to focus on results to achieve a persons why," Gong says.

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