



Jason Driver Mid-Atlantic Regional Director

Jason Driver is the Regional Director for the Mid-Atlantic Region at Dunham & Associates Investment Counsel, Inc., responsible for helping financial advisors develop their advisory practice and expand their assets under management. He accomplishes this by drawing on his experiences as a financial advisor for over 14 years at Merrill Lynch and Raymond James.

Because of career changes during his 14 years in the industry, Jason successfully built three books of business. This experience, combined with his over 27 years in the asset management industry, allows Jason to bring his financial advisors a unique wealth of knowledge on how to use Dunham's Asset Allocation Programs, institutionally-managed mutual funds, and Dunham Trust Company's Nevada-based trust services. He uses his experience to help advisers acquire new clients, get more assets and referrals from existing clients, and help retain assets across multiple generations.

Prior to assuming his current responsibilities at Dunham in 2008, Jason was a Regional Director with Integrity Funds Distributor, Inc. Before that, he served as a financial advisor at Raymond James, as well as Merrill Lynch.

Jason carries a B.S. in Economics from the University of Delaware and holds FINRA Series 7, 63 and 65 registrations. He is a family man who has learned to balance work, travel, and family life. He resides in West Chester, Pennsylvania with his wife Jodie and three children.

At a Glance

- ✓ Regional Director for the Mid-Atlantic Region
- ✓ Brings his financial advisors a wealth of knowledge on how to use Dunham's many services
- ✓ B.S. in Economics from the University of Delaware
- ✓ Holds FINRA Series 7, 63 and 65 registrations

About Dunham & Associates

In 1985, Jeffrey Dunham founded Dunham with the uncommon idea that fees paid by clients should be tied, in some way, to the performance of the investments they own. Today, Dunham and Dunham Trust have grown to become a multi-billion dollar firm, but we are still driven by the values of fairness and accountability that Jeffrey envisioned more than three decades ago.