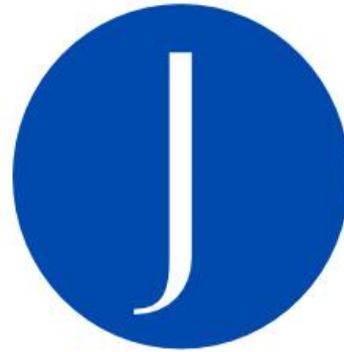


# Professional Biography



JASON JACKSON

*Innovator*

# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## Biographical Overview

Forbes Finance Council member, U.S. Naval veteran, spiritual leader, and community organizer, Dr. Jason Jackson is a sought-after innovative theorist and transformational guide. Regularly covered by over 150 media outlets such as CNBC, TBN, and the Boston Globe, Dr. Jackson has earned a distinguished reputation as a social and economic pioneer. He is a devoted husband to his wife, Natalie, and father to Nalani, Jessica, Joshua, and Noah.

Dr. Jackson is internationally known for his position as the Founder and Chief Investment Officer of IBS Investment Bank, where he is responsible for oversight of the firm's investment portfolio. His peers frequently call upon him to serve as an expert speaker in national conferences for the Association of Corporate Growth, Crittenden Real Estate Finance, and Noble Capital Markets ([Featured Video](#)).

In addition to his business initiatives, Dr. Jackson has established a broad array of community-centric platforms, ranging from food salvage to youth risk reduction programs. Through his leadership mobilization organization, Jackson Global Initiative, he serves as an advisor to government, community, spiritual leaders, and a diverse group of entrepreneurs and corporate executives. He serves on a diverse group of boards and committees, including:

- [IBS Institutional Capital, an IBS Investment Bank sister company- Chairman;](#)
- [SCORE Palm Beach County powered by the U.S. Small Business Administration- Chairman;](#)
- [Broward Sheriff's Office Social Justice Task Force;](#)
- [The University of South Florida, Muma College of Business Steering Committee;](#)
- [United Nations Chaplains Association- Chairman;](#)
- [LifeNet4Families;](#)
- [Forbes Finance Council.](#)



# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## Military and Education

Before returning to the private sector, Dr. Jason Jackson functioned as a professional in the United States Navy, Naval-Aviation division, based out of Lemoore, California. During his two tours in the Western Pacific, Dr. Jackson participated in Operation Enduring Freedom (2001) and Operation Iraqi Freedom (2003). Throughout his military career, he and his squadron earned high honors, including:

- National Defense Award,
- Navy Unit Commendation,
- Two Letters of Commendation, and
- The Naval Aviation Warfare Specialist designation.

Shortly after completing his military tour, he received his Bachelor of Science in Business Administration from the University of Phoenix, Arizona (UOP), and continued working towards his Master's in Business Administration with UOP's School of Business. In 2016, Dr. Jackson was honored with his Doctorate in Business Administration from Concordia College's life-skills program.

During his schooling, Dr. Jackson continued his career and training with HSBC Bank, Wachovia Securities, Wells Fargo Bank, and BankAtlantic. He served as a registered representative with FINRA (Financial Industry Regulatory Authority) as a Uniformed Securities States Law, Investment Company Products, and Limited Variable Contracts professional. He was also registered with the State of Florida, holding Life Insurance, Health Insurance, and Variable Annuities Licenses.

Dr. Jackson maintains ongoing corporate finance and transactional training as an active member of the National Association of Certified Valuators (NACVA), Consultants Training Institute (CTI), Forbes Finance Council, and Association of Corporate Growth (ACG). He holds an active Business Mentor Certification with the Small Business Administration's mentoring arm, SCORE Mentors. In addition, Dr. Jackson holds active credentials as a Level-5 Board Certified Chaplain with the United Nations Chaplains Association for disciplines including social and economic development, crisis counseling and interventions, and disaster management.



# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## Entrepreneur Fueling American Business

In 2011, Dr. Jackson founded IBS Investment Bank (IBS), a fully integrated merchant banking firm. Through IBS, Dr. Jackson pioneered ground-breaking financing structures for American manufacturers, retailers, distributors, and real estate operators. Known as a top investment banker for private placement transactions, Dr. Jackson has executed his commitment to bring "corporate finance to the community" by making large-cap financing products available to small-to-medium-sized businesses and real estate investment companies. Dr. Jackson is frequently called upon by his peers to serve as an expert speaker in national conferences and associations such as Opus Connect, Noble Capital Markets, Crittenden Real Estate Finance, and the Association for Corporate Growth.

### *Significant Business Achievements:*

- During the last quarter of 2011, Mr. Jackson raised capital to expand into the retail lending sector, raising over \$100MMUSD for franchises such as IHOP, Comfort INN, Best Western, Subway, and others. The financing covered gaps left by depository banks during the Great Recession ([Press](#));
- In February 2013, Mr. Jackson sourced and structured \$350MM of equity and debt capital to provide senior loans to distressed commercial real estate;
- In April 2014, Mr. Jackson founded and sponsored the \$225MM financing vehicle that focused on providing senior debt on small-balance commercial real estate throughout the continental U.S.;
- In June 2015, Mr. Jackson structured one of the first credit enhancements used to secure the U.S. government's investments in the Alternative Care Organization model ([Press](#));
- By the end of 2019, Mr. Jackson completed over 18 mergers, acquisitions, and restructures in the alternative energy, affordable housing, specialty manufacturing, aerospace, and aviation sectors;
- In mid-2020, Dr. Jackson leveraged his firm's fintech platform to streamline the acquisition, underwriting, and funding of applications under the Federal Reserve's Mainstreet lending program. The program was launched to support small to medium-sized businesses during the COVID-19 crisis ([Press](#)); and
- In mid-2021, Dr. Jackson became the youngest Palm Beach Chapter Chairman for SCORE Mentors, the U.S. Small Business Administration's premier resource for small business mentorship.

# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## Community Builder Supporting Communities

In addition to his business efforts, Dr. Jackson's community leadership is recognized by his ongoing collaboration with over 90 community shapers including The American Red Cross, Federal Emergency Management Agency (FEMA), Leadership Broward, Salvation Army, United Way, The Boys and Girls Club, as well as a myriad of faith-based organizations, emerging non-profits, and municipalities seeking to synergize their communities.

### *Significant Community Achievements:*

- In 2015, Dr. Jackson founded The Lion's Den Missions Base (TLD), a ministry focused on the needs of South Florida Residents. Through its bulk distribution and community resource sites, TLD has supported over 5,000 underserved families with food, language assistance, tutoring, education, and counseling. In 2020 Dr. Jackson received a Proclamation from the Florida Legislature for his work at TLD;
- In 2016, Dr. Jackson founded the United Nations Chaplains Assn, a private agency that has emerged as a leader in disaster management, having coordinated with FEMA, The American Red Cross, and over 200 agencies to streamline services and impact the lives of over 7 million people affected by disasters ([COVID Response Video](#)) ([Hurricane Maria Interview](#));
- In 2016, Dr. Jackson founded the Tree of Life Foodbank, which encompasses a self-sustainable social and economic model intended to be replicated in underserved populations ([Website](#));
- In 2019, Dr. Jackson co-founded The Supernatural Girl, a non-profit focused on developing girls between the ages of 8-18 in wellness, emotional intelligence, entrepreneurship, and conflict resolution ([Event Video](#));
- In mid-2020, Dr. Jackson co-founded the UNCA Police and Community Engagement Initiative, a non-profit focused on creating platforms for law enforcement to support youth prosperity and youth risk-reduction ([Informational Video](#));
- In late-2020, Dr. Jackson joined the Broward Sheriff's Office (BSO) to support the agency in building the infrastructure for its Social Justice Task Force (SJTF). The BSO SJTF is designed to build long-lasting partnerships and beneficial relationships between BSO and the community ([Press Video](#)); and
- In mid-2021, Dr. Jackson became completed 3-executive board assignments, including leading the HOA of a mid-size, luxury community through creating internal audit models, sourcing and executing major contracts, and launching several sub-committees.

# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## Core Areas of Expertise

Dr. Jackson is experienced in creating and sustaining foundations for launch, expansion, or restructuring.

- **Market Penetration:** building products or services and mobilizing teams to increase market share.
- **Executive Board Management:** building, motivating and deploying boards to achieve organizational targets.
- **Capital Raising & Fund Development:** establishing systems to capitalize for-profit and NGOs.
- **Next-Generation Strategy:** developing strategies to bridge generational chasms and promote leadership succession.
- **Managing Hypergrowth:** designing and scaling high-performing organizations from concept to exit.
- **Business Model Shift:** developing strategies to pivot changes in products, services, and internal channels.
- **Entrepreneur Engagement:** developing positive outcomes amongst new, maturing, and seasoned entrepreneurs.
- **Public-Private Partnerships:** creating and managing collaborative platforms for private entities and public officials.
- **Social & Economic Development:** developing community strategies to promote social and economic growth.
- **Policy Design & Implementation:** identifying and establishing effective policies that address organizational opportunities.
- **Investor Relations and Communications:** attracting and managing high-touch institutional investor relationships.
- **Mergers, Acquisitions, and Divestitures:** sourcing and structuring complex acquisition and dispositions for the middle-market.
- **Transaction Opinions:** establishing quantitative and qualitative values of corporate and commercial real estate transactions.
- **Risk Management:** assessing financial, credit, supply chain, market, and economic risk.
- **Intellectual Property:** assessing the value of formal and informal intellectual property ([Press](#)).

## 6 Ways to Connect

Dr. Jackson's insight and forethought can fuel your organization by energizing conferences, unlocking staff creativity, developing strategic corporate initiatives, or opening access to capital. Choose from the six defined paths of connectivity.

- **Speaking Engagements:** keynote, panels, roundtables, Q&A Session, masterclass, and expert interviews.
- **Workshops:** executive committee, corporate board, training webinars, and custom workshop development.
- **Advisory Engagements:** transactional, dispute resolution, creditor and investor, organizational, and capital advisory.
- **Board Appointments:** executive, advisory, or committees.
- **Executive Coaching:** business, group, career, personal/life, performance, legacy or expert communication.
- **Interim or Fractional Executive Appointments:** remote or hybrid contractual executive appointments to support hypergrowth, business models shifts, change management, or acquisitions.

# Dr. Jason Jackson

“Leader Mobilizing Leaders”

## How to Connect

### **Mailing Address**

JGI Office  
12161 Ken Adams Way, Suite 118  
Wellington, Florida 33414

### **Booking Inquiries**

For speaking engagements and workshops, inquiries, including requests for the most recent speaking and workshop topic catalog visit <http://www.jacksonglobalinitiative.com/booking-inquiries/>

### **Engagements and Appointments**

To discuss board, interim executive appointments, or advisory engagements, email Jacqueline Brown at [administration@UNCPA.us](mailto:administration@UNCPA.us) or connect with Dr. Jackson via LinkedIn at <https://www.linkedin.com/in/jason-jackson-chairman-1542689>.