



**Jackson L. Allen, CFP®**

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November 10, 2025

This brochure supplement provides information about Jackson L. Allen that supplements the Diversified, LLC brochure. This brochure is meant to supplement the Diversified, LLC firm brochure, a copy of which you should have received. Please contact David Levy, Chief Compliance Officer, if you did not receive the Diversified, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Jackson Lee Allen (CRD # 7371632) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 Educational Background and Business Experience**

### **Jackson Lee Allen, CFP®**

Jackson joined Diversified, LLC in 2024 as a Wealth Advisor. Prior to joining Diversified, LLC, Jackson was an associate advisor for Kuhn Advisors from 2023 and an analyst for Tolleson Wealth Management in 2022. Jackson, born in 1996, is a 2020 graduate of Campbell University, where he earned a Bachelor of Business Administration degree in Trust and Wealth Management and a Masters of Business Administration.

In 2025, Jackson earned the Certified Financial Planner™ designation (CFP®) from the College for Financial Planning. The CFP® is conferred by the Certified Financial Planner Board of Standards, Inc. after candidates have met all of the requirements for certification. Those requirements include having completed a Board-Registered educational program, having at least three years of qualifying work experience in the personal financial planning area, and passing the CFP® Certification Examination. The exam, which is administered over two days, tests a financial planner's ability to apply his or her knowledge to specific client situations. Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct to maintain the right to continue to use the CFP® marks.

## **Item 3 Disciplinary Information**

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There are no applicable disclosures to report for Jackson Allen.

## **Item 4 Other Business Activities**

Jackson Allen is a business consultant to the executives of Get Actual, Inc. DBA Fig Wealth, a financial services and bookkeeping entity. Mr. Allen does not render any investment advice or participate in the investment advice rendered by Get Actual, Inc. DBA Fig Wealth. His duties as the consultant of Get Actual, Inc. DBA Fig Wealth do not create a conflict of interest to his provision of advisory services through Diversified, LLC.

There is no overlap between Mr. Allen's activities with Fig Wealth and his advisory work through Diversified, LLC. These roles are completely separate, and therefore do not create any conflict of interest for Diversified's clients. Clients of Fig Wealth are not solicited for services from Diversified, and clients of Diversified are not solicited for services from Fig Wealth.

## **Item 5 Additional Compensation**

As noted in Item 4 above, Mr. Allen also receives compensation in the form of equity interest as a consultant for the other business activity listed above.

As a fiduciary, Jackson makes product recommendations that he feels are in client's best interest and are based on the specific needs and objectives of the client, not the compensation potential of the product or other business activities.

## **Item 6 Supervision**

Diversified, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm. The Chief Compliance Officer is David Levy. Mr. Levy implements policies and procedures to ensure compliance with industry rules and regulations. He maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. Diversified, LLC has a specific Code of Ethics that applies to all employees. Mr. Levy implements procedures to ensure employees comply with the firm's Code of Ethics, and he monitors all reports provided pursuant to the Code. Mr. Levy is located in the Diversified, LLC main office in Wilmington, DE, and he can be reached at 302-765-3500.