



## James Atkinson

**James Atkinson serves the financial needs of business owners and professionals by implementing comprehensive wealth planning strategies that position clients to achieve their financial goals.**

Jim has served owners and principals of businesses and professional practices for nearly 30 years, experiencing both challenging and rewarding market cycles. He has earned several advanced degrees and designation in finance, such as the CERTIFIED FINANCIAL PLANNER™ certification, which enable him to help clients focus on the elements of financial planning that are important to them. The combination of his professional experience and his academic rigor allow Jim to serve executives that often have unique and complex situations.

Jim provides a high level of service and attention to each of his clients. They can expect to begin their comprehensive financial planning process by reviewing the five elements every business owner should address. Jim will construct and implement a personalized plan and establish a two year, eight quarter structured review process to proactively update the client on the progress of achieving their objectives. Jim promises and delivers monthly contact to business owners and provides a 24-hour response and 48-hour resolution to their concerns. His depth of experience enables him to share important investment and planning insight that allow his clients to navigate varied and unpredictable financial environments.

### **Education, Specialized Training and Registrations**

- B.S., The Ohio State University
- Master Planner Advanced Studies<sup>SM</sup> (MPAS<sup>®</sup>)
- CERTIFIED FINANCIAL PLANNER™ Practitioner
- Accredited Investment Fiduciary<sup>®</sup> (AIF<sup>®</sup>)

Jim is an active leader in the community participating in several charity groups, such as Charity Newsies, an organization dedicated to providing clothing to needy children. He is also active in The Catholic Foundation, St. Patrick's Pastoral Council and Licking Memorial Hospital Development Council.

Family and faith are Jim's priorities, and he enjoys meeting and working with people who share similar values. Jim is an avid outdoorsman, and he can often be found fresh water and fly fishing, upland hunting, sporting clays, hiking and shooting outdoor photography.

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