Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401(k) Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management

Qualifications:

- CMFC (Chartered Mutual Fund Counselor)
- BA in Communications from Western Michigan University

James J. Walsh, CMFC

James provides comprehensive wealth management strategies to help people optimize their financial lives. As a financial adviser, he works closely with individuals and families to guide them toward their financial goals. His services include financial planning, retirement planning and investment management.

James has around 20 years of experience in the financial and retirement planning industry. He is a Chartered Mutual Fund Counselor and an alumnus of Western Michigan University with a BA in Communications.

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James J. Walsh (continued)

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What do you find most rewarding about your work? What do you think is important about giving back to your community – both at the firm and for you personally?

The most rewarding thing about being a financial adviser is having the opportunity to help guide people toward reaching their financial goals. Achieving those goals allows people to focus on their passions, and in helping them do so their passions become my passions. To see someone fulfill his or her dreams – whether it's traveling the country in an RV or launching a new business – is a tremendous experience. In a sense, it is a way to help people in my community become the people they most want to be, to live the kind of life they want to live.

What influenced your decision to join Advance Capital?

There are many qualities that attracted me to Advance Capital and that make it a great place to work. Among those include its fiduciary and client-centric process, employee-owned structure, depth of resources, fee-only approach and unbiased disciplined investment strategy. Though perhaps above all is the talented men and women who make up the firm.

Were there any particular learning experiences that prepared you for this role?

Working for almost 20 years in the financial and retirement planning industry has given me a true understanding of what matters most to clients and what adds value to their experience working with a financial adviser.

Fun Fact!

In addition to going the extra mile for his clients, James loves to go above and beyond, literally, in his spare time. He enjoys hiking and mountain climbing out west, and he often participates in duathlons.