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Jim has been in practice more than 35 years. He received his Bachelor of Science degree from Niagara University and Chartered Financial Consultant and Chartered Life Underwriter designations from the American College. He holds a CERTIFIED FINANCIAL PLANNER designation as well. He is an Investment Advisor Representative of MML Investors Services, LLC and he specializes in estate and financial planning for privately held businesses and individual clients.

He is a 30+ year member of the Million Dollar Roundtable and chaired its international marketing committee and ethics committee. Jim is past president of the Buffalo chapter of the National Association of Insurance and Financial Advisors and past Regional Vice President of the New York State association. Jim received its highest award for lifetime service to the industry and Buffalo community. He is also a past president of the Estate Analysts of WNY.

Jim is on the Niagara University School of Business Advisory Board and is a founding sponsor of the NU Family Business Center and he is among the Business First Who's Who in Insurance and Banking and Finance.

He has lectured and authored articles on retirement and estate planning, employee benefits and business ethics. Jim is also a certified continuing education instructor for Certified Public Accountants (CPA), Chartered Life Underwriters (CLU), and Certified Financial Planners (CFP®) in Florida and New York.