James W. Coleman, Sr.

Jim Coleman is an independent financial advisor with two decades of experience in the financial services industry. He specializes in developing unique financial strategies that help clients create a reliable income stream that they cannot outlive, while working towards improving portfolio returns, helping to protect their principal and reduce taxes.

As founder of Coleman Financial Advisory Group, Jim provides uncompromising attention to detail as he reviews the client's current and future financial situation, risk tolerance and personal priorities. He walks clients through a step-by-step procedure designed to ensure comfort and confidence at every stage of the decision making process. Only then does he suggest appropriate financial strategies to help clients identify and realize their lifetime goals.

Having received both national and regional recognition from financial organizations, Jim has been sought out by many of his industry peers to teach his strategies and disciplines. He authored a book on the topic of retirement income and investing titled, Educated Investing: Your Guide to Surviving and Thriving in the Fast-Paced Global Markets of the 21st Century. He is the host of *All About Money*, a weekly radio talk show on WATR in Connecticut, and he writes a regular financial column for the Prospect Pages.

Jim graduated from Northeastern University in Boston with a double major degree in finance and marketing. Committed to uplifting the ethical standards of his peers in the financial industry, he passed a rigorous eight-point background check for criminal, civil, and business violations, to become a member of the National Ethics Bureau. Jim is also a member of the Financial Planning Association, the largest organization of professionals dedicated to championing the financial planning process.

A father of five children, Jim is family and community-oriented. He stands by the importance of investing not just in one's own future but in society's as well.

Education / Affiliations

- Bachelors of Science – Northeastern University, Boston
- Member, Financial Planning Association

Media Resource

- Book Author – *Educated Investing: Your Guide to Surviving , and Thriving in , the Fast-Paced Global Markets of the 21st Century*
- Radio Talk Show Host – *All About Money*, WATR in Connecticut
- Financial Columnist – Prospect Pages
- Broadcast Appearance – "Imus in the Morning", WTNH News Channel 8, WATR *Ed Flynn Show*
- Success Profile – Connecticut's Magazine
- Contributor – Kiplinger's Personal Finance, Physician's Money Digest, Forbes.com, CNBC, Yahoo! Finance, MarketWatch, Research magazine and Advisor Today