SILVERLEAF
WEALTH MANAGEMENT

People work hard for their money. Jim helps his clients' money work hard for them. Jim enjoys learning about his clients and what is important to them. He then creates plans that help them pursue their financial goals.

Jim began his career in 1989 working for companies in the Midwest and helping people achieve their company goals. In 2008 he decided to enter into Financial Advising and help clients work toward their personal goals. His favorite experience is that moment during a client meeting when their eyes light up with the belief, they can achieve the goals they have set for themselves.

During his career, Jim has earned several achievements and awards. When asked his favorite, he usually cites his Career Achievement for 100 financial plans while at Waddell and Reed. Jim's education includes a B.S. from Wayne State College and an MBA from Iowa State University. He holds Series 7 and 66 registrations through LPL Financial and the Accredited Wealth Management Advisor certification from the College of Financial Planning.

During his time away from the office, Jim enjoys spending time with his wife, Kris, and their two daughters. Kris is a Partner Consultant for accounting software firm, Xero. Jim and Kris are both Nebraska natives who have lived in Omaha since 2005. Jim's interests include fishing, reading, archery, and be began guitar lessons in 2018.

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THE ART OF INVESTED RELATIONSHIPS

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