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James W. Barnett, ChFC, CLU

Profile:

- Vice President, Creative Financial Strategies;
Investment Advisory Representative, Lincoln Financial Securities Corporation
- Over 35 years of experience in the financial services industry practicing, consulting, supervising and teaching.
- Expertise in non-qualified executive and director benefits planning, and estate planning for business owners and executives.
- National speaker for a proprietary patented planning process, LifeComp[®], focusing on insurance and liquidity design options.



Education:

- CHARTERED RETIREMENT PLANNING COUNSELORSM (**ChFC**)
College for Financial Planning
- CERTIFIED FINANCIAL PLANNERTM (**CLU**)
CFP Board of Standards and Practices
- Bachelor of Arts, Political Science
Furman University

Financial Industry Regulatory Authority (FINRA) Registrations:

- FINRA Investment Co./Variable Contracts Representative (Series 6)
- State Securities Law Exams
 - Uniform Securities Adviser Law Examination (Series 65)
 - Uniform Securities Agent State Law Examination (Series 63)
- State Agent Registrations
Alabama, Alaska, Arkansas, Florida, Georgia, Illinois, Indiana, Kansas, Minnesota, Missouri, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, South Carolina, Tennessee, Texas, Virginia, and West Virginia

(Over)

Affiliations:

- Board of Boy Scouts of America for Midlands of South Carolina Council
- Member of Spring Valley Country Club
- Pinnacle Member of Premier Partners of Lincoln Financial
- Resident License through South Carolina Department of Insurance
- Non-Resident Licenses through Alabama, Alaska, Arkansas, Florida, Georgia, Illinois, Indiana, Kansas, Minnesota, Missouri, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, South Carolina, Tennessee, Texas, Virginia, and West Virginia