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James W. Barnett, CEBC, 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 FINANCIAL CONSULTANT® (ChFC)
The American College
- CHARTERED LIFE UNDERWRITER® (CLU)
The American College
- 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)

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Affiliations:

- Member of Pinnacle Equity Solutions
- Business Intelligence Institute (BII)
- 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