

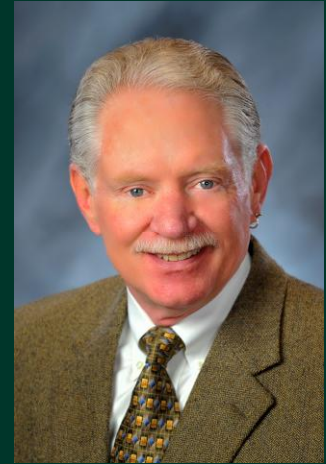


Financial Advisors of Delaware Valley

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“The future is not some place we are going to but one we are creating. The paths to it are not found but made and the making of these pathways changes both the maker and the destination.”

Jim Brooks

Jim began his successful career in the financial services industry in 1975 with the former Topkis Associates. He believes in the main building blocks of a client/advisor relationship: trust, honesty and integrity and in always putting the clients' interest first. Jim's experience encompasses the in-depth areas of business succession; the transferring of one's business from generation to generation, or from partner to partner. Preservation of the value of one's many years of work in a business, in a tax efficient manner, is one of his prime concerns. In developing a road map for the successful business transition, Jim further incorporates strategic planning in the areas of retirement planning, estate preservation and asset preservation.

As a Financial Advisor, Jim works with individuals and business owners in the areas of benefit design, pension insurance, estate and succession planning. His goal is to help his clients make the best possible decisions about the allocations of their financial resources by helping you define and qualify your financial goals and objectives, and providing access to a wide range of competitive products and services.

Jim has been a member of the Million Dollar Round Table (MDRT) and has been awarded the HIQA and the NQA. He also served five years as a board member of the National Association of Insurance and Financial Advisors (NAIFA).

Jim is a lifetime resident of Delaware. He received his B.A. from the University of Delaware and the CLU® designation from the American College.

In his spare time Jim enjoys sailing on his boat “Neverland” on the Chesapeake, in New England and eventually to the Caribbean with his wife Cynthia.

Offices in
Delaware ♦ Pennsylvania ♦ New Jersey ♦ Maryland

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