

JAMES VERBONITZ

**DIRECTOR
ADVANCED MARKETS
CFP®, ChFC®, CLU®**



James brings a decade and a half of financial services experience to his role with Transamerica's Advanced Markets Group. Having worked as a financial advisor and wholesaler, James offers a well-rounded perspective as he helps financial professionals develop personalized financial road maps for their clients.

James' experience applying advanced financial planning strategies has evolved over the years into a passion and dedication for helping financial professionals identify opportunities and grow their practices. He travels the country presenting on strategic planning topics such as estates and trusts, retirement planning, taxation, and Social Security and Medicare.

James is a Certified Financial Planner™ (CFP®), Chartered Financial Consultant® (ChFC®), and a Chartered Life Underwriter® (CLU®). He earned his bachelor's degree in financial planning while graduating magna cum laude from Colorado Technical University.

James lives with his wife and three children in the Sarasota, Florida area. When he's not working, he enjoys spending time with his family, boating, fishing, and traveling.

Our Mission: Connecting Wealth + HealthSM

Transamerica is leading the charge to champion the connection between Wealth + Health. People want to live long, healthy lives with the financial means to do so. They're concerned about healthcare costs, retirement readiness, and protecting their family's quality of life. We're committed to helping them prepare for every part of that future — because a sound financial strategy is about more than dollars and cents. After all, what good is wealth if you're not healthy enough to enjoy it?

About James:

- Business opportunity identification
- Advanced financial planning strategies
- Perspective
- Certified Financial Planner™ (CFP®)
- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)
- Member of the Financial Planning Association
- FINRA Series 7 and 66 registrations
- Florida Life, Health, and Variable

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transamericaadvancedmarkets.com

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