



JAMES GRAHAM, CFP[®], CCFS[®]

**Executive Vice President of Sales
CERTIFIED FINANCIAL PLANNER[™]
professional**

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I'm on a mission to help people achieve financial independence.

My Business Philosophy

I help families and businesses save for retirement in the most efficient way while also helping to protect their biggest assets. The team of financial planners, investment specialists, and insurance professionals behind me allows me to help provide each of my clients with the best comprehensive plan possible.

Professional Qualifications

- Bachelor's degree in Finance and Accounting, Samford University (2014)
- Earned CERTIFIED FINANCIAL PLANNER[™] professional designation
- Passed FINRA Series 6, 63, 65, 7 Exams
- 2017 Leaders Conference Qualifier, Massachusetts Mutual Life Insurance Company
- Who's Who in Financial Planning & Wealth Management - 2020, 2021

About Me

I was born and raised in Birmingham, Alabama. I attended Samford University, where I double majored in Finance and Accounting and ran cross country and track. I also met my wife (Brooke) while at Samford. My wife and I have three children – Colson, Barrett and Remi. Still an avid long-distance runner, I regularly run marathons and I've run the Boston Marathon twice.