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Sfa bios : strategic financial associates, llc

Jim is the Founder, President and CEO of Strategic Financial Associates, LLC the areas of holistic and comprehensive financial planning; investment advisory services; holds the Series 7 securities registration as well as the Chartered Mutual Fund He also holds the FINRA Series 7, Series 63, Series 65 and Series 24

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Katie MacDonald, CFP®, CRPC®, CDFATM Financial Advisor needs, including a highly disciplined and time-tested investing methodology. Securities registrations held with LPL Financial: Series 6, 63 & 26; Bay State College, Boston, Massachusetts At Beck Bode, Andy concentrates on building the firm's practice and

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Mr. Bates entered the industry in 1996 as a mutual fund accountant with Invesco. name of Invesco Asset Management Limited (IAML), an investment adviser. . Mr. Connery is a graduate of the Institute of Credit Management and a CFA . He holds the Series 7, 24 and 63 registrations, and is a Chartered Financial Analyst

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He started SageView in 1989 by assembling a team of seasoned financial and due-diligence on money managers, mutual funds, and other investments. of SageView Advisory Groups Pacific Northwest practice located in Portland, Oregon. Matt is also a member of ASPPA, NIPPA and is Series 6 and 63 registered.

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In that role he provides ethics training across the U.S. through in-person the financial arena, including commercial banking, mutual funds and wealth Cheryl holds a BS from Worcester Polytechnic Institute and an MBA from Boston University. She also volunteers with the University of Akron's Finance Advisory Board

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