



James M. Kar, ChFC®

Financial Services Representative
Principal Securities Registered Representative
Financial Advisor



Your unique goals—my top priority. I'm committed to helping you achieve & maintain financial success

Let's connect:

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EXPERIENCE:

After graduating from Purdue University, Jim owned and operated a restaurant and catering service in Boca Raton, FL for 10 years. In 1987 he made the transition to the securities and insurance business. His attention to detail is impeccable and his passion has been successfully demonstrated in both careers.

EDUCATION & CREDENTIALS

Jim holds his Series 7, 63 and 65 securities registrations and various insurance licenses. At Principal® he achieved both Premier Club and Honor Council status. Jim is a member of the National Association of Insurance and Financial Advisors (NAIFA). He obtained the designation of ChFC® (Chartered Financial Consultant®) through the American College of Financial Services®.

His practice focuses on professionals and corporate executives approaching retirement assisting them with a long-term strategy designed for financial security. This includes financial and estate planning. Jim's vast knowledge of investment and insurance products allows him to provide diversified investment solutions to help meet their financial goals. He strives to provide straightforward fees and advice. He works actively in both the traditional and non-traditional couples market and has aligned himself with attorneys and CPAs who have a good working knowledge of the unique challenges faced by these individuals.

INTERESTS:

Jim has a large heart for charitable organizations. He volunteers on retreats and provides advice and education on charitable giving. Jim is an active scuba diver, sport fisherman and enjoys adventure traveling with his partner as well as gourmet cooking.

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