



James "Jim" Plasko

Vice President of Business Development

Honors & Distinctions:

- Board of Directors, Financial Planning Association of Middle Tennessee
- Board of Directors, Catholic Business League
- Volunteer, St. Henry Career Transition Group

"People deserve to have a champion in their corner to fight for their dreams. My clients are prepared to win that fight. Together, we can achieve your goals so you may truly live a life of dignity, success, significance, and meaning."

Jim Plasko has been a proud member of the financial services industry since 2001. He is passionate in his mission to serve the growing financial needs of families and business owners throughout Middle Tennessee.

Everyone has a story that drives their own personal passion and success. For Jim, that story begins with his family. As a husband and father, Jim recognizes that the early years of building a family are filled with some of the most daunting financial pressures. He strives to help every new family understand that financial independence is a lifelong process. It starts by asking tough questions, facing threats head on, and laying down the foundation for a solid financial strategy.

As wealth and independence begin to grow, Jim encourages families to take additional steps to help protect what they have worked so hard to build. His

mission is not to simply point clients in the direction they want to go, but to build genuine relationships and walk alongside his clients as a trusted representative and ally for years to come.

A graduate of Fordham University in New York, Jim focuses on personal financial strategies, income and survivorship protection, retirement choices, business planning, and estate planning. With a commitment to individual attention and lifelong relationships, Jim seeks to design custom solutions for each client based on their individual hopes, dreams, and goals. He is insurance licensed in Life & Health and Property & Casualty in Tennessee, and he is a FINRA Registered Principal with Series 6, 7, 24, and 63 securities licenses as well.

An active member of his church, Jim resides in Bellevue with his wife and three beautiful children.

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