

Meet James LaFleur

James LaFleur

Senior Plan Advisor

About Me

James brings an experienced perspective to creating and optimizing retirement plans for his clients.

His extensive career includes advising institutional investors of all sizes, guiding individual investors, and managing and building funds to develop retirement plan products. What he enjoys most about his job is assisting clients and knowing his efforts have helped put them in a better position.

Some fun facts about James: He created an app called “Better Budget” to track total personal expenditures and designed a table called “PizzaSpace” that holds your pizza while you eat. Additionally, he has run six marathons.



Educational Background & Experience

- Boston University – Master of Business Administration
- University of Massachusetts Boston – Master of Science in Information Technology
- Bentley College – Bachelor's Degree – Finance
- FINRA Series 6, 63 & 65
- The Commonwealth of Massachusetts – Life, Accident and Health Insurance licenses
- Certified Investment Management Analyst (CIMA®)
- Chartered Alternative Investment Analyst (CAIA)
- Retirement Management Advisor (RMA) Certified Private Wealth Advisor (CPWA®)

Out of the Office

When he's not in the office, James is either doing family stuff with his two boys or working on home renovations/improvements.

Contact Information

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