



James S. Farmer, CLU, ChFC

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Background & Experience

As a founding managing partner with FSG, with over thirty five years of experience, James has assisted numerous high-net worth clients in planning their estates and paying minimal or zero estate tax. Prior to FSG, James was a First Vice President with Wachovia Securities and Prudential Securities, where he helped lay the groundwork for the development of a nationwide Business and Estate Planning program. Currently James is the Estate Planning instructor at the Exit Planning Institute. From 1979 to 1996, James was with Prudential where he held numerous management positions.

James has won multiple President Citations and was the president of the Association of Life Underwriters in Chicago and Vice President on the Charter Life Underwriter (CLU) Board. Additionally, he has been published in the CLU Journal. He is a Chartered Life Underwriter (CLU), a Chartered Financial Consultant (ChFC) and holds life, accident and health licenses, as well as Series 7 and 63 registrations.

Certifications & Education

- Illinois State University, Normal, IL - B.S. Finance, 1979