



**James Henley, CLU®, ChFC®**

Insurance Planning Advisors  
Strategic Partner of The Pinnacle Group  
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**Background & Experience**

20-year veteran of the financial service industry, James Henley consults with select financial advisors, private wealth bankers, and their high net worth clients, specializing in supplemental retirement planning, wealth transfer and risk mitigation strategies. He also plays an integral role in assisting his partner advisors with growing their practice through his client identification process. He is most known for his ability to boil complex strategies down to easy actionable steps. James' success is clearly displayed through his performance: in the last eight consecutive years, he earned a place among the top ten point of sale professionals for Wells Fargo, and even landed in the top three for three of those years.

James is a graduate of Florida State University, where he was an all-conference swimmer. He holds his Chartered Life Underwriter and Certified Financial Consultant designations from The American College. James and his wife, Kara, reside in Apollo Beach, FL with their two teenage children. Away from work, James is active in youth sports coaching and spends time running, biking, boating, and playing basketball.

**Certifications & Education**

- Certified Financial Planner, ChFPC®
- Chartered Life Underwriter, CLU®
- Florida State University - Tallahassee, FL