



Jim Nolan CLU®, CLTC®

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Background & Experience

Jim Nolan, CLU®, CLTC®, serves as Senior Vice President for Lion Street Private Client Group in Ohio, Kentucky, and Indiana. Over the past 20 years, he has developed his skills in designing and implementing sophisticated insurance strategies to meet the needs of his advisors' top clients.

Prior to joining Lion Street, Jim was a specialist for MetLife and Lincoln Financial, as well as a consultant to various institutional clients while working with a Brokerage firm. Jim has extensive experience in building partnerships with Attorneys and CPA's, bringing Estate Planning and protection solutions to their high-net-worth clients. In his current role with Lion Street, his focus is point-of-sale support related to life insurance and long-term-care strategies.

In addition to his Chartered Life Underwriter (CLU®), and Certification in Long Term Care® (CLTC®) designations, he holds the FINRA Series 6, Series 65 and Series 63 licenses.

Certifications & Education

- Ohio University, Athens, OH - BA, Finance, 2002
- The American College - Chartered Life Underwriter, Certification in Long Term Care Planning