WealthBuilders
Financial Group Inc.
Professional Tax, Retirement & Estate Planning

James M. Noto, CFP®

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James M. Noto, CFP® Biography

Under the leadership of James Noto, the *Wealth*Builders Financial Group has grown quickly to become one of the premiere financial services firms in the Tampa Bay area. In 2001, Jim opened new offices in the Trinity area to keep up with client demand.

Jim has been building towards this dream for over a quarter of a century. A native New Yorker, Jim chose to pursue a degree in finance at Ohio University, where he became fascinated with economics. He says,

"I loved finding out how monetary and financial systems work and how those systems can be integrated to form the basis of a financial plan."

After graduation, Jim moved into the financial arena immediately, working for twelve years with the insurance and financial advisory giant, Cigna Corporation, as Vice President. He spent five years with Merrill Lynch where he was recognized as Financial Planner of the Year in 1995 before deciding to establish his own firm in Trinity. Jim has been chosen by a constantly growing number of clients whom seek his specialized assistance in managing their finances.

Jim currently has assets under management of over $100 million. He offers a diverse array of financial service and investments through Independent Financial Group, LLC, FINRA/SIPC, clearing through Pershing LLC, all designed to help clients reach their goals.

*Wealth*Builders Financial Group, specializes in helping people accumulate and preserve wealth for retirement. Jim makes available many services that include numerous financial instruments. He likes to view himself as being able to provide clients with a boutique approach to financial planning.

"What separates us from so many other financial services firms," Jim says,

"Is the depth and range of services we can provide."

Drawing upon the vast combined experience of his own staff, plus a plethora of recognized resources and some of the region's premiere tax attorneys and CPA's, Jim sees his team as a powerful resource for clients.

"People only retire once and we help them avoid costly mistakes and make the most of their hard earned money."

Although we have grown by leaps and bounds in recent years, Jim has made a priority of keeping in touch with clients on a quarterly basis (and in some cases, more often). We pride ourselves on serving our clients' needs.

"We get to know them as if they were a part of our family," he always says.

His purpose is to help his clients achieve their goals through income programs to support a comfortable standard of living throughout their retirement, integrating investments for tax minimization, consistent monitoring of investments and updating your changing needs as market conditions dictate. This is all integrated with your estate planning to help preserve assets accumulated over a lifetime for your loved ones.

James M. Noto, CFP is a Registered Principal offering securities and advisory services through Independent Financial Group, LLC, a registered investment advisor. Member FINRA/SIPC. WealthBuilders Financial Group Inc. and IFG are unaffiliated entities.