

James Verbonitz

CFP®, ChFC®, CLU®

Senior Sales Consultant, Advanced Markets



JAMES VERBONITZ brings nearly a decade and a half of financial services experience to his role with Transamerica's Advanced Markets Group. Having worked as a financial advisor and wholesaler, James offers a well-rounded perspective as he helps financial professionals develop personalized financial road maps for their clients.

James' experience applying advanced financial planning strategies has evolved over the years into a passion and dedication for helping financial professionals identify opportunities and grow their practices. He travels the country presenting on strategic planning topics such as estates and trusts, qualified retirement plans, IRA planning, taxation, and Social Security and Medicare.

James is a Certified Financial Planner™ (CFP®), Chartered Financial Consultant® (ChFC®), and a Chartered Life Underwriter® (CLU®). He earned his bachelor's degree in financial planning while graduating cum laude from Colorado Technical University.

James lives with his wife and three children in the Denver area. When he's not working, he enjoys spending time with his family at their Southwest Florida home, coaching his son's flag football team, and mountain biking.

At a glance

- Business opportunity identification
- Advanced financial planning strategies
- Perspective

Accreditations

- Certified Financial Planner™ (CFP®)
- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)
- Member of the Financial Planning Association
- FINRA Series 7 and 66 registrations
- Colorado Life, Health, and Variable

Background

CURRENT RESIDENCE

Denver, CO

EDUCATION

Colorado Technical University, cum laude graduate, Bachelor of Science, Financial Planning

HOMETOWN

Bowling Green, KY

Get in touch



EMAIL

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VISIT

TransamericaAdvancedMarkets.com

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™, and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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