

PROFESSIONAL PROFILE

James Weinberg, CFP®, CRPC®, CSNA

James Weinberg is a Financial Advisor who joined Merrill Lynch in 2007 in the Atlanta Buckhead office. A graduate of Tulane University, James started in the financial services industry in 2005 helping clients in retirement planning strategies. He also has a Masters degree from the Krannert School of Business at Purdue University and has completed the Professional Financial Planner Program at Oglethorpe University.

James is a CERTIFIED FINANCIAL PLANNER™ certificant, a designation awarded by the Certified Financial Planner Board of Standards, Inc. and also a Chartered Retirement Planning CounselorSM (CRPC®) a designation awarded by the College for Financial Planning. James takes a personal approach with each client utilizing Merrill Lynch's Wealth Management Process that focuses on the financial goals and concerns important to each client. He helps clients determine their long-term financial goals and works with them to implement their wealth management strategies. James takes the time to listen and understand each client's needs utilizing a win-win approach toward reaching their financial goals.

James is a Certified Special Needs Advisor (CSNA) in the Merrill Lynch Special Needs Financial Network. Merrill Lynch Financial Advisors in the network provide financial, estate, retirement, and investment planning strategies for families of children with disabilities.

James lives in Fulton County with his wife, Mindy, and their two children. He is a past president of the Atlanta Chapter of the International Customer Service Association and is a member of the United Way Cole Society.