



Jim Nolan, CLU®, CLTC®, serves as Senior Vice President for Lion Street in Ohio and surrounding region. Jim draws upon his wealth planning knowledge to design and implement sophisticated insurance strategies to meet the tailored needs of high-net-worth families, executives and business owners.

PROFESSIONAL HIGHLIGHTS

Jim has been in the financial services industry for 18 years. Prior to joining Lion Street, Jim was an Insurance Specialist for Brighthouse Financial. Prior to that, he was with BK Adams and Associates, as a Wealth Planning Specialist, responsible for subject expertise and point-of-sale support of life insurance and long-term care products for Financial Advisors and their clients in Ohio, Michigan, and Indiana.

DESIGNATIONS | LICENSES

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.

Jim lives in Powell, OH with his wife Amber and 3 children, Lucy, Jameson, and Almie, along with their beloved English Cream Retriever, Ruby. Jim enjoys spending time with family and friends, along with traveling and golfing.



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Securities offered through Lion Street Financial, LLC., Member FINRA & SIPC.

Lion Street Private Client Group is comprised of an elite national network of planning specialists in the major U.S. wealth markets. We partner with financial advisors and professionals to provide sophisticated planning solutions, business and estate planning strategies, charitable planning, and specialized expertise focused on helping high-net-worth and business clients succeed.

Neither Lion Street, Inc., nor any of its affiliates provide legal or tax advice. For complete details, consult with your tax advisor and attorney.