



## **James A. Kaffenbarger, Jr., J.D., CFP®**

**Account Executive**

**John G. Ullman & Associates, Inc.  
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***When James works with a client, he brings his training and experience as an attorney to the relationship. While he does not practice law for clients at JGUA, he works with clients as their advocate with complete confidentiality. His approachable style and willingness to get the job done are qualities his clients highly value.***

### **Credentials**

- Case Western Reserve University School of Law, J.D.
- Miami University, BA Economics & History
- Bar Admissions: New York, Maryland (inactive), Ohio (inactive)

### **Community Service**

- Chemung Valley Montessori School Board of Trustees (2000-2006)
- Arnot Ogden Medical Foundation Board (2008-Present)

## **Background**

After specializing in insurance defense litigation in Maryland, James and his wife, Dr. Kimberly Preucil Kaffenbarger, decided to move back to Kim's home town of Elmira to raise their family. At that same time, he also decided to make a career change and enter the financial management field. The change of both location and career have proven to be rewarding decisions for both James and the firm.

## **Areas of Expertise**

- Estate Planning
- Tax Planning
- Retirement Planning
- Education Funding Analysis
- Executive Benefits

