



James D. Epp, JD, CFP®
Associate Account Executive

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James prides himself on his attention to detail. This trait, combined with his passion for excellence and his sense of humor, makes him a valuable addition to the firm. When not working, he enjoys spending time with his wife and five children.

Background

After nearly a decade of private law practice, during which he focused on the areas of real estate, small business and estate planning, James decided to enter the financial management field. James joined JGUA in June 2009 after gaining significant experience as a Financial Advisor at Merrill Lynch.

Credentials

- Regent University School of Law, JD (*cum laude*)
- Roberts Wesleyan College, BA, Communication (*magna cum laude*)
- Certified Financial Planner® Practitioner
- Bar Admissions: New York, Virginia (inactive), Washington, D.C. (inactive), North Carolina (inactive)

Areas of Expertise

- Estate Planning
- Risk Management
- Financial Plan Development
- Retirement Planning

Community Service

- Keyboard Player in Grace Community Church band
- Active with Boy Scout Troup 2911

