



J. Phil Buchanan, CFP®
Chief Executive Officer



About Phil

Phil is one of the most highly sought wealth management experts in America. He works with major financial services firms in North America and their subsidiaries abroad as a Speaker, Trainer, Consultant and Coach.

In addition to training wealth management professionals, Phil keynotes at industry gatherings, speaks regularly to wealthy clients on behalf of financial firms, writes for industry publications and is frequently interviewed by the media on wealth management.

Through practical messages and unique approaches to practice management, Phil teaches wealth management professionals how to prepare themselves with the knowledge they need to serve the wealth market, how to communicate their expertise to wealthy clients and prospects through interviewing, and --how to reach the pinnacle of personal and professional success

Phil's goal is to instill confident competence in each Financial Professional not only in the technical aspects of their business, but in sales and service to their clients. His focus on and knowledge of superior practice management techniques guide financial professionals to effectively working their book of current clients and attracting new clients in an unparalleled way. He seeks to inspire advisors by creating personal accountabilities and actionable business plans that produce results.

Primary Areas of Expertise

Sales and Sales Management
Practice Management
Wealth Transfer
Estate Planning and Taxation
Domestic and International Private Banking
Commercial Lending

Education

B.S. in Economics, *University of Georgia*
The College for Financial Planning:
Certified Financial Planner® Program

J. Phil Buchanan - Chief Executive Officer

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The American College:

Chartered Financial Consultant Program

Chartered Life Underwriter Program

Designations, Affiliations & Licenses

- Certified Wealth Strategist®
- Series 65, Registered Investment Advisor
- Certified Financial Planner®
- Chartered Financial Consultant (ChFC)
- Chartered Life Underwriter (CLU)

Featured Speaker & Lecturer

- Morgan Keegan
- Bank of America/Merrill Lynch
- Morgan Stanley
- US Bank
- UBS
- Comerica
- Advanced Equities
- BB&T
- Ameriprise
- Sigma
- TIAA-CREF