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James S. Gallagher

Financial Advisor

Member since	02/25/2011
Member through	03/13/2019
Company	Waterstone Financial
Website	http://www.waterstonefs.com
Industry	Financial Services

Description

James Gallagher and the team at Waterstone Financial have brought together a group of financial, tax and legal experts who specialize in advising clients on such subjects as:

- how to preserve assets and reduce taxes,
- how to diversify a portfolio for *growth* and *safety*,
- and how to create more income for retirement.

Our firm is committed to the financial security of our clients and we are proud to provide exemplary customer service, while displaying the highest standards of ethics and professional knowledge. Our unique approach to financial planning brings easy-to-understand cost and risk analysis designed for current economic conditions.

Bio

After graduating top in his class from the University of Western Ontario, James went on to become a director of engineering at General Motors. Among his many accomplishments, he was named 'engineer of the year' and has patents for the popular Avalanche program. With a minor in economics and finance James handled multi-million dollar budgets and was instrumental in running many successful, cost effective programs.

As the economic tides changed James saw an opportunity to follow his dreams and re-locate to Southwest Florida where he has been actively involved as a tax, retirement and income advisor. His success and passion for helping others achieve their financial goals was the foundation for opening Waterstone Financial. His innovative, intellectual and intuitive approach has made him a top producer in the industry.

James and his wife Amy, a native of Southwest Florida, have been married for 29 years and have two wonderful children.