Primiano Financial
Guiding Your Community

Client Education. Local Community. Retirement Planning.

OUR MISSION

At Primiano Financial, we are committed to helping you achieve confidence while investing for retirement. Our team maintains the highest standards of integrity and professionalism in our client relationships. By getting to know you and understanding your financial situation, we are able to provide you with the most useful and appropriate solutions available to help prevent you from outliving your income.

OUR CLIENTS

Why choose Primiano Financial as your trusted financial advisor?

INDEPENDENCE

In 2001, James decided to join NEXT Financial Group Inc. as an Independent Registered Representative. Being independent allows us to provide our clients with a wide range of financial services using an unbiased approach.

COLLABORATION

Over many years as a financial advisor in our local community, James has developed a solid network of nearby accountants and attorneys, providing us with an even stronger support system through which to serve clients.

PLANNING

James specializes in retirement planning for those at or near retirement. He can create a customized retirement plan to help you to preserve and maximize your current income, assets, and the future inheritance you may wish to leave behind.

STRATEGIC RESEARCH

As an independent wealth manager, James selects investment strategies which can help our clients meet their specific needs in retirement. By taking you through a thorough research process to **1)** determine your current financial position and **2)** build a comprehensive retirement analysis and strategic investment plan, we can help you keep pace with your present and future income needs.

CLIENT EDUCATION

James is committed to fostering and furthering client education. As a Certified Financial Education Instructor, James runs his practice by emphasizing financial literacy. We continuously offer education to our local community through our workshops. Ask us about what we have coming up next! And be sure to check out our website, where you'll find a helpful online client research center and library full of important financial topics.

COMMUNITY INVOLVEMENT

Community is at the heart of our practice. James has been very active in a number of local, professional, charitable, and social organizations, such as: Buffalo Niagara Partnership, Junior Achievement, The Hamburg Chamber of commerce and other local Chambers or Commerce. He served as a long-time member of the Board of Directors for the Make-a-Wish Foundation of Western NY and is an active member in the Ride for Roswell.

OUR SERVICES

We walk you through a step-by-step process that will help make you feel confident in your financial decisions. Let us help you execute a sound financial plan which incorporates the following products and services:

- Tax Management
- Investment Management
- Retirement Strategies
- Estate Conservation
- Insurance and Annuity Products
- Financial Education

OUR BACKGROUND & QUALIFICATIONS

James Primiano's qualifications and Licenses include Series 6, Series 7, Series 63, Series 66, Life, Accident, and Health Insurances and is NYS Partnership Certified. James is a Certified Financial Education Instructor, Associate Professor, Wealth Manager and Investment Advisor representative of NEXT Financial Group Inc. He works with the public and other financial professionals to create Community Education Programs as well as Financial Literacy Programs. In addition to instructing Community Education Classes throughout area high schools, James is also an Associate Professor at Erie Community College where he has taught college level Investments courses.

CONTACT US

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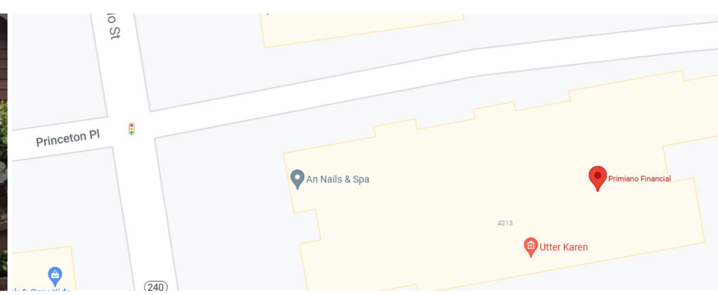

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