

Jim Lombardo
Senior Advisor
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CORE KNOWLEDGE AND SKILLS

First licensed in 1991 Jim has accumulated 30 years of experience in the financial services industry. Today his focus lies in planning for individuals and companies, with a specialty in navigating 401k plans, insurance and group benefits.

Jim is the office president for Belpointe's Cherry Hill New Jersey office and is the first point of contact for our clients situated in Pennsylvania and New Jersey.

Jim is a Qualified Plan Financial Consultant, he holds a Series 66, Series 63, Property, Casualty, Life & Health licensure. As a pro-active and highly regarded member of the business community Jim serves as the Trustee to a Multiple Employer Plan established by Belpointe to serve clients throughout the United States. Jim is sought out for his creativity in delivering effective insurance solution across all lines of business. At Belpointe Specialty Insurance Partners Group he manages regional collaborations and client solution delivery in New Jersey and Pennsylvania.

WORK HISTORY

2019 – Present Belpointe – Senior Advisor and President Belpointe SIPG NJ Office

In 2019 Jim joined forces with Belpointe Financial Group. Working with Belpointe Jim has been a key person in the development of improved access to collaborators and financial products for private, commercial and public clients. At Belpointe Financial Group Jim serves as a Senior Wealth Manager, Trustee and an Associate Partner at Belpointe Specialty Insurance Partners Group (SIPG).

2008 – Present Chaslyn Financial Group

Private client needs have been met by Jim and his team since 2008. He continues to serve these clients under this entity channeling the resources of the Belpointe Financial Group to place their business.

1994 – 2003 WS Griffith Securities Inc.

With a focus on company and private financial solutions Jim was a Senior Sales Representative

1991 – 1993 The Prudential Insurance Company

Sales Manager - Insurance based financial products.