



James F. Glass

Meet Jim Glass

For more than 30 years, James F. Glass has operated a successful business based on the relationship he builds with each client. That relationship begins when a business, family or individual recognizes the need to build and protect assets and plan for the future.

Through one-to-one consultation, Jim helps his clients articulate their vision for financial independence and peace of mind, then offers strategies to help achieve goals they define:

- A comfortable retirement
- Lifetime income
- Family business succession
- Long-term financial security

What about you? Jim can help you to address important decisions that all of us encounter but which many of us fail to act upon soon enough.

He begins by helping you gain a better sense of where you are and where you want to go. He designs a process to help you optimize growth, mitigate risk, and protect wealth. When changes in tax laws, in the marketplace or in your situation call for adjustments, Jim provides the expertise to keep you on track.

Whether you have already accumulated significant assets or are building your way up, you will appreciate the sound advice and measurable results that Jim provides. Also consider this: most of Jim's new clients are referred by his existing clients, their CPAs or their attorneys.

How can Jim Glass help you? Contact him today to schedule a no-obligation appointment.

Telephone: 408-255-2559

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Business Financial Services

Strategies

- Grow and Protect a Business
- Ensure Sustainability
- Plan for Transition
- Create a Legacy
- Prepare for Succession

Solutions

- Employee Retirement Plans
- Group Benefit Plans
- Executive Plans For Owners and Key Persons
- Buy/Sell Plans
- Business Protection, Transition and Succession Plans
- Estate Analysis
(Federal Estate Tax Estimate)

Family & Individual Financial Services

Strategies

- Accumulate Wealth
- Protect a Portion of Your Income
- Invest for Retirement
- Improve Cash Flow
- Reduce Taxes
- Plan a Legacy

Solutions

- Comprehensive Fee-Based Planning
- Life, Disability Income and Long-Term Care Insurance Coverage
- Health, Dental and Vision Care Coverage
- Individual Retirement Plans
- Education Planning & Funding
- Estate Tax Analysis & Planning
- Brokerage Services

IN BRIEF:



James F. Glass, President
Glass & Associates Ltd.

A resident and fifth generation native of San Jose, Jim has made a life and career in this city. He earned his Bachelor of Arts degree at San Jose State University, is active in his alumni association, and has a long history of involvement in professional and community organizations. He also holds a 2nd degree black belt in the marital art of Kajukenbo.

Jim's professional life began as a social sciences teacher at Silver Creek High School. In 1981 he shifted careers to financial services and he continues to educate clients on approaches to achieving financial security and peace of mind.

Glass & Associates Ltd. Financial & Insurance Services

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James F. Glass is a registered representative of and offers securities and investment advisory services offered through MML Investors Services, Inc., member SIPC. 2121 North California Blvd., Suite 395, Walnut Creek, CA 94956, (925) 979-2300.