JAMES E. “JIM” PEARMAN, JR., CPA/PFS, CFP®

james@partnersinfinancialplanning.com

James E. “Jim” Pearman, Jr., CPA/PFS, CFP®, is a 1970 honors graduate in accounting from Virginia Tech. He received his Certified Public Accountant (CPA) designation in 1972. His experience includes four years with Peat, Marwick, Mitchell CPAs (now KPMG Peat Marwick) and sixteen years as a banking executive with both large and small banking organizations.

Jim has specialized in providing comprehensive financial planning since 1990 with special expertise in income taxes, estate and retirement planning. Medical Economics magazine selected Jim in 1998, 2000, 2002, 2004, 2006 and 2008 as one of the top financial advisors for doctors in the United States.

Jim is a member of the American Institute of CPAs (AICPA) and its Personal Financial Planning and Tax Divisions and was awarded AICPA’s Personal Financial Specialist (PFS) designation in 1996. He is also a member of the Virginia Society of CPAs (VSCPA) where he has served on several committees, including five years on its Personal Financial Planning Committee, and three years on the Financial Planning Forum Task Force. He is a member of the New River Valley and Roanoke Valley Estate Planning Councils. Jim has served as an industry expert for the North American Securities Administrators Association (NASAA) Exams Advisory Project Group that develops and reviews questions for securities exams. He has also written a book entitled Financial Planning for the Older Client that was published by Commerce Clearing House in October 2000 and his volume is included in their Financial Solutions web-based reference service.

Jim is a Certified Financial Planner™ licensee from the Certified Financial Planner Board of Standards (CFPBS). He has served on several committees for the CFPBS relating to the CFP examination. He is a NAPFA-Registered Financial Advisor® (National Association of Personal Financial Advisors). Jim previously served as President and Chair of NAPFA’s South Region Board of Directors. In 2006 he was elected to serve a three-year term on NAPFA’s National Board of Directors. Jim serves on the Board of Trustees of the NAPFA Consumer Education Foundation. He is a Registered Investment Advisor Representative with the Securities and Exchange Commission. He is also a Virginia-licensed life/health and property/casualty insurance consultant.

Jim serves on the Virginia Tech Foundation's Board of Directors and on its Investment Committee. He is a long-time member of the Pamplin College of Business Advisory Council, including a two-year term as Chair. He is also a member of the Advisory Council of the Department of Accounting and Information Systems. In April 2000, he received recognition from Beta Alpha Psi as the chapter's Outstanding Alumnus. Jim has served in several leadership roles with the Virginia Tech Athletic Fund Board of Directors and with the Roanoke Valley Hokie Club, where he currently serves as Treasurer.

Jim is currently serving as Chairman of the Board of Directors of the Southwestern Virginia Second Harvest Food Bank. He is a member and past president of the Shawsville Ruritan Club. He is a past master of Craighill Masonic Lodge, a member of the D.C. Shanks Royal Arch Chapter, the Scottish Rite, and Kazim Temple.

Jim is a life-long member of White Memorial United Methodist Church in Shawsville where he has served in various leadership roles. He currently serves as Treasurer of the Roanoke District of the United Methodist Church and as a Board Member and Finance Committee Chair of Camp Alta Mons, Inc. He served on the Virginia United Methodist Conference Committee on Finance and Administration from 1998 until 2007.

Jim and Brenda, his wife of over forty years, make their home near Dixie Caverns in Roanoke County.