JIM LUSK, CFP®,CLU®, ChFC®, CLF®, M.Ed.
President, Retirement Nationwide, Inc.
DEFENSIVE RETIREMENT SPECIALIST

PHILOSOPHY

Since over a third of one's life is spent during retirement, I believe that maximizing your retirement income through proper planning, by integrating: conservative investments, tax planning, best pension option choices, long term care planning and social security decisions are paramount to have successful "defensive retirement strategies".

CREDENTIALS

Certified Financial Planner™ (CFP®)

Received in 2006 from the CFP® certification program. With all the financial choices available today, a CFP® can help you integrate insurance, investments and savings into a comprehensive plan. This designation includes coursework in investments, taxation, wealth accumulation and retirement planning.

Chartered Leadership Fellow (CLF®)

Received February, 2004, from The American College. Leadership starts at the top and permeates our entire culture. We believe that everyone in our organization can take a leadership role of serving our clients, agents, staff and management team.

Chartered Financial Consultant (ChFC)

Received May, 1987, from The American College. This designation is designed to train and educate financial services professionals in the areas of pensions, estate planning, wealth accumulation, financial strategies, insurance and other related areas.

Chartered Life Underwriter® (CLU®)

Received October, 1986, from The American College. This designation is related to the ChFC® designation above with emphasis on life insurance applications to the concepts above.

Masters Degree in Education Administration (M.Ed.)

Received June, 1982, from Eastern Washington University. This education has helped me in the management area. My experience as the principal internship, coupled with six years teaching math and physics, has proven invaluable in training and supervising agents and managers.

Bachelors Degree in Math/Computer Science (B.A.)

Received June, 1977, from Whitworth College. This degree has enhanced my ability to configure computer proposals and comparisons in a rapid changing technological and financial world. The first two years of college were completed at the United States Air Force Academy.

EXPERIENCE AND AFFILIATIONS

President of and Founder of Retirement Nationwide, Inc. since 1985.
Managing Producer - QLS
Past President of Eugene Chapter of The Society of Financial Services Professionals, current Member Spokane Chapter
Member of The Million Dollar Round Table 1984-1991
Member of the National Association of Insurance & Financial Advisors, (NAIFA) past president of N. Idaho Chapter, local board
Speaker to numerous groups on Sales Training, Motivation, Pre-Retirement Planning and other Financial Services

Jim Lusk, CFP®, CLU®, ChFC®, CLF®

www.retirementnationwide.com
email: jim@retirementnationwide.com
Cell 509-850-1150
13104 E. Copper River Lane Spokane, Washington 99206