

## Jim Ferrell

James W. Ferrell is the founding shareholder and President of Ferrell Wealth Management, Inc. Prior to the formation of the firm, Mr. Ferrell was a co-founding partner of Chastang, Ferrell, Sims & Eiserman, L.L.C (now LarsonAllen). Prior to the formation of Chastang, Ferrell, Sims & Eiserman, L.L.C. and Ferrell Wealth Management, Inc. (formerly CFSE Wealth Management, Inc.), he served as a senior consultant in the tax department of Price Waterhouse.

Mr. Ferrell holds designations as a Certified Public Accountant (CPA), Certified Financial Planner (CFP), Personal Financial Specialist (PFS), and Certified Investment Management Consultant (CIMC). He is a member of the American Institute of Certified Public Accountants, Florida Institute of Certified Public Accountants, and Investment Management Consultants Association (IMCA).

In addition to serving on the board of the Center for Advanced Entrepreneurship, Mr. Ferrell serves on the boards of the University of Central Florida Foundation and the Winter Park YMCA. He is also the President of Morning Star Charities, Inc.

Mr. Ferrell is an inductee into the UCF College of Business Administration Hall of Fame. He received his MBA from Florida State University and graduated Summa Cum Laude from the University of Central Florida, with a double major in Accounting and Finance.

