



Service first, last, and always. Everything else will take care of itself.

Phone:
(401) 864-7656

Email:
jscanlan@apellacapital.com

Designations:
CFP®

Why did you become a financial advisor

During college, I had the opportunity to work at a hotel during the night shift. During my time there, I met a man who lived at the hotel and owned the Shubert Theatre in Boston. He would come in around 3:00 am from the theatre, and would often stop to talk. We talked a lot about investing, and it was on his recommendation that I made my first investment, in AT&T. I considered becoming a stockbroker for a while, but then I discovered the difference between a broker and a planner from an older friend. He said, "I am able to provide my family with a good living while helping other people with their financial households." That stuck with me, and I ended up taking a position with the same firm where he worked.

Why do you do what you do?

I offer guidance to help families achieve their financial goals and plan for their futures. For the past 35+ years, I've been able to fulfill my dreams of helping others create the future of their dreams, while doing the same for my family. I'm very fortunate to have always loved finance and investing, and this career has allowed me to do what I love.

What distinguishes Apella Capital?

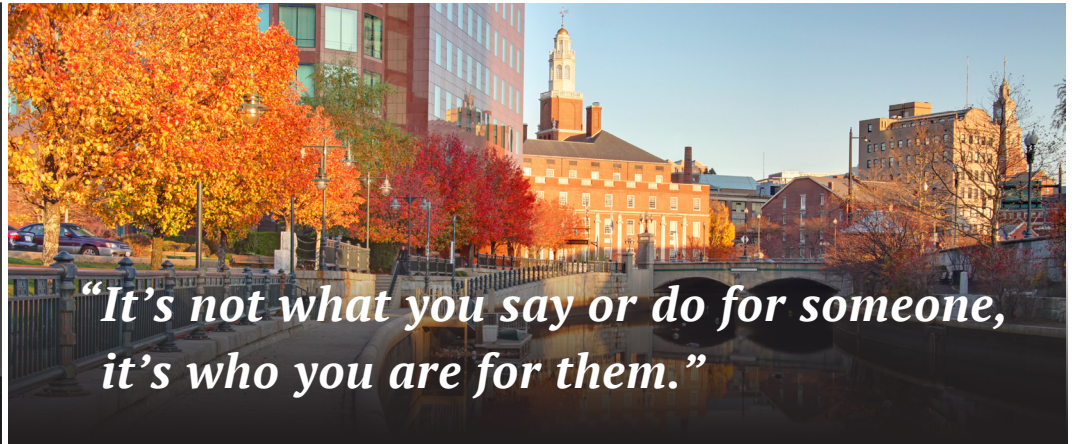
I think one of the biggest things is our philosophy of academic science as a basis for decision making, as opposed to the "conflict of interests" type of approach that we see too much of in the industry. I would also add that Apella's comprehensive financial planning goes far beyond what most of financial services firms are offering.

What are you passionate about?

I am extremely passionate about advocating and working for children, particularly protecting children and creating opportunities for those in disadvantaged situations. Every year our office supports an annual event staged by the Center for Resilience, a board I've served on for over 10 years. The goal of the event is to help higher-risk kids develop the social, emotional and mindfulness skills that will enable them to succeed. We teach 2,500 kids throughout the school year.

What's the best advice you're ever received?

Service first, last, and always. Everything else will take care of itself.



*“It’s not what you say or do for someone,
it’s who you are for them.”*

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James “Jim” Scanlan views the advisor’s ability to help families deal with one of the major stresses in life, their finances, as the most satisfying aspect of his career. With almost four decades of experience in the financial services industry, he brings a wealth of expertise to Apella.

He specializes in retirement plan management and asset management, as well as business succession planning and estate planning for business owners, high net worth individuals, and successful professionals. Prior to joining Apella, he was the Director and Planning Officer at Weston Financial Group, Inc., a registered investment advisory firm based in Welleley, MA.

Jim is very active in the community and was recently named a Paul Harris Fellow by the Providence Rotary Club for his dedication to community service. He has served for more than a decade as a board member for Rhode Island’s Center for Resilience. He is also a former member of the board of trustees for the Providence Rotary Charitable Foundation as well as the Stonehill College Alumni Foundation, and he is a former member of the Wannamoisett Country Club Board of Governors.

However, his proudest achievement is his contribution to getting legislation passed in Rhode Island to extend the statute of limitations on childhood sexual abuse to 35 years from age 18.

When not working or busy with community service, Jim enjoys playing golf and squash and practicing yoga.

Jim graduated from Stonehill College in Easton, MA with a B.A. in Finance. He also is a proud holder of the Certified Financial Planner (CFP) designation.

He has two daughters and one son.