



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

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Designations:
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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.