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I grew up in the Carlisle area and earned my degree in Business Administration from Millersville University. My Central Pennsylvania roots have taught me the importance of family and the value of community. It is my primary focus to understand my clients' priorities and to empower their long-term security and financial goals. I am dedicated to building a lasting and genuine relationship with my clients. Recognizing that our needs and goals change over time, regular communication is an integral key to helping ensure my clients' plans are relevant and current with their financial goals.

Mission Statement

At uFinancial Group, we act with integrity and compassion, and use our resources and expertise to build relationships that work towards positive growth and financial security for our clients and their loved ones. We are educators of our communities, helping people discover and achieve their personal and financial dreams.

www.ufinancialgroup.com



James Grier

PROFESSIONAL SPECIALTIES:

- Retirement Income Planning
- College Funding Strategies
- Investment Strategies
- Risk Management Strategies
- Personal Financial Strategies
- Life and Disability Insurance

QUALIFICATIONS:

- Investment Advisor Representative – MML Investor Services, LLC
- Registered Representative – MML Investors Services, LLC
- FINRA Series 7
- Series 66 – Uniform Combined State Law Examination
- Licensed in Life & Health, Fixed Annuities
- Bachelor's Degree from Millersville University

James Grier is a registered representative of and offers securities, investment advisory, and financial planning services through MML Investors Services, LLC, [Member SIPC](#). 5001 Louise Drive, Suite 300, Mechanicsburg, PA, 17055. 717.791.3300

Check the background of this investment professional on FINRA's [BrokerCheck](#)

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