Meet James Bremis

James Bremis

CFP®, CPWA®, AIF®, CPFA™, Financial Planner

About Me

James is focused on providing guidance to retirement plan participants and helping his private clients addressing the two fundamental questions that every investor has: "Will I make it, and do I have any financial blind spots?"

Prior to Sentinel, James worked at OppenheimerFunds, consulting with the largest wealth management firms in New York City. His expertise there was in retirement solutions, practice management, and niche investment classes (emerging markets, MLPs, high yield municipal debt, and smart beta).

Prior to joining OppenheimerFunds, James worked as an Investment Consultant at Sentinel Group, leading a team working with retirement plan trustees on investment menus, employee education, plan design & effectiveness, and financial planning. He also served on Sentinel's Investment Committee, building investment strategies and financial plans for private clients. James holds a B.A. in Economics from Boston University.

James is a CERTIFIED FINANCIAL PLANNER™. He also holds the AIF® and CPFA designations. In his spare time, James is very involved with Big Brother Big Sister of New York City, serving on the Executive Board of the Young Professionals Committee and as a mentor.

Educational Background & Experience

- Boston University, Boston, MA – Bachelor of Arts – Economics
- Accredited Investment Fiduciary®, AIF®
- Certified Plan Fiduciary Advisor, CPFA
- FINRA Series 7 & 66
- CERTIFIED FINANCIAL PLANNER™
- Certified Private Wealth Advisor, CPWA®
- Yale School of Management – Executive Education Program – Wealth Management Theory & Practice

Out of the Office

James enjoys golfing, travelling, and exploring New York City.

Contact Information

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