



Jim McGowan
Financial Advisor

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New England Securities

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As a financial advisor, Jim's mission is to assist individuals, families, and business owners in defining their financial goals and achieving financial freedom. He is highly trained and licensed to provide expert financial solutions to his clients and prospects. Jim's goal is to become a lifelong resource for his clients, and he is dedicated to assisting them through the various stages of their financial lives. At Baystate Financial Services, Jim is able to utilize a team approach and draw upon the wealth of knowledge of specialists and associates to create custom designed financial strategies for his clients.

Jim holds a Bachelor of Science degree from Westfield State College and Masters of Business Administration degree from Bryant University. Jim has been working in the financial services industry since 1992. He is Series 6 and 63 securities licensed as well as Life, Accident and Health licensed. Jim is currently pursuing the CERTIFIED FINANCIAL PLANNER™ (CFP) designation from Boston University.

Personal Financial Needs

Investment Strategies
Insurance Needs Analysis
Education Funding Strategies
Retirement Planning Strategies
Estate Conservation Strategies

Insurance and Annuities

Whole Life Insurance
Variable Life Insurance
Disability Income Insurance
Term Insurance
Universal Life Insurance
Variable Universal Life Insurance
Long Term Care Insurance
Fixed and Variable Annuities

Investments

Mutual Funds
IRAs/IRA Rollovers
Retirement Plans (401(k), SEP...)
Brokerage Services
Institutional Investment Products and Services

Employee Benefits

Employee Pension, Profit Sharing, & 401(k) Plans
Group Life & Disability Insurance
Group Health Insurance
Key Executive Benefit Plans
403b Plans

Business Protection

Business Succession Strategies
Key Person Life Insurance