



JAMES E. MEYER

Jim Meyer has over twenty years of experience in the financial services industry. Most of his expertise is in the marketing and relationship building arena. Jim is also looked to as a leader in the not-for-profit sector because of both his general skills dealing with non profits and fundraising and his specific area of knowledge, Planned Giving.

Jim is the President of the Long Island Affiliate of the Partnership for Philanthropic Planning, The Charitable Estate Planning Council of Long Island (CEPC, LI). He also served for nine years as Vice President of the Long Island Chapter of The Association of Fundraising Professionals (AFP,LI) and continues as a member of the board of directors and is a Past President of the Long Island Chapter of The Financial Planning Association (FPA, LI).

Jim was both a former faculty member and Director of Alumni Relations and Development of Queens College of The City University of New York (CUNY). Jim periodically teaches on the faculty for continuing studies at Hofstra University, Long Island University, C.W. Post Campus and Molloy College. Jim is a regularly requested speaker of the CEPC, LI, the AFP, LI and the FPA, LI and presents many continuing education programs for Certified Public Accountants, Enrolled Agents, Insurance Agents, Certified Financial Planners and Attorneys. Jim also does numerous presentations on Planned Giving to the Boards and/or financial committees of the charities and universities of Long Island as well as national meetings of 501(c)3 organizations.

A native New Yorker, Jim received his bachelor's degree from The State University of New York, College at Brockport and holds master's degrees from both Columbia University and Hunter College of CUNY. He is a board member of several 501(c)3 organizations and writes a regular column for The Voice which is the AFP, LI publication.