THE SILBERNAGEL GROUP INC.
Real Wealth® Advisors

Meet Jim Silbernagel, CFP®, LACP, LUTCF®, CEPS

Entrepreneur – Educator – Philanthropist

Jim Silbernagel is an independent registered representative of Concorde Investment Services, LLC. who entered the insurance industry in 1982, followed by the financial services industry in 1986.

Jim is the Creator and Host of *Real Wealth*®, a podcast for insurance and financial professionals to help educate their clients on how to make suitable choices with their money, strategies to help avoid financial hardship, work towards their financial goals. Jim is also the Creator and Host of *Power Session* LIVE, a monthly best practice and training session for advisors nationwide featuring top business leaders. Jim is also dedicated to providing resources pertaining to Long-Term Care with all of America.

Jim is a successful Financial Professional and also takes the time to enjoy life. He is an avid Green Bay Packer fan and visits Lambeau Field for games just about every year. Jim is a licensed pilot and flies to see his family and friends all over the country. His other preferred means of transportation is by boat, which he takes out fishing regularly each summer.

Jim is a family man, with his wife of over 34 years, Joanne, working in the office with him. Joanne's sister is also a part of the business, working in Jim's tax department. He has also been lucky enough to have each of his children, Frank, Warren, and Angela, join him in the office as well. Although his sons have moved on to other jobs, Jim is proud that his daughter Angela has chosen to make a career working alongside him.

Jim's personal mission in life is to raise the financial literacy in the U.S. and to make a positive, meaningful difference in people's lives.

www.SGAdvisor.net | (262) 626-8892 | Hello@SGAdvisor.net | 114 Main Street, PO Box 427, Kewaskum, WI 53040

Professional Organization Involvement

- Life and Qualifying Member of Million Dollar Round Table (MDRT)
- Member of Forum 400 since 2002
- Former Forum 400 Board Member
- Passionate National Association of Insurance Financial Advisors (NAIFA) Member since 1989
- Member of Financial Services Institute (FSI) and
- Former Member of Advisors in Philanthropy (AIP)
- Former President for NAIFA-Ozaukee/Washington
- Served in every board position and on nearly every committee for local NAIFA Chapter
- MDRT Foundation Chair Member
- Advisory Board for 6 years with Woodbury Financial
- Served on the expert panel for Long-Term Care (LTC) for the Financial Planning Association (FPA) of WI
- Keynote Speaker, presenting for groups including NAIFA, FPA, MDRT, and Forum 400
- Advisory Board Member for AdvisorBid
- Participant in various study groups for the last 20 years
- Regularly attends political forums to visit with state representatives and also attends the national political forums in Washington D.C. to meet with local Congressmen, both to discuss important issues that affect our clients
- Regularly attends and speaks at more than 30 educational events each year

Philanthropy and Volunteering

- Ambassador and Advisory Board Member of Main Street Philanthropy
- Has moderated several Junior Achievement classes in local grade schools and high schools
- Member of Business Advisory Committee for Kewaskum High School
- Former Treasurer for Great Lakes Fishing Club
- Leading supporter of Insurance and Financial Advisor Political Action Committee (IFAPAC), the MDRT Foundation, and Life Happens
- Past supporter of the former Association of Health Insurance Agents (AHIA)
- Two-time volunteer judge of the Life Lessons Scholarship through Life Happens, which offers scholarships for aspiring students who have lost a parent who didn't have life insurance
  2006 judge for Life Happens' Real Life Stories
- 15+ time volunteer at the 1.5 day annual MDRT Foundation Phone-a-thon
- Phone-a-thon Chair for the MDRT Foundation
- Makes regular time, talent, and treasure donations to nonprofit organizations including the Boys & Girls Club, Stars & Stripes Honor Flights, his Alma Mater Marquette University High School, St. Matthew's Catholic Grade School, Big Brothers Big Sisters, Make-a-Wish Foundation, Give Kids the World Village, and even took his entire team to volunteer at the Ronald McDonald House as part of the SG 2019 Christmas Party

Licensing and Designations

- Has earned his Certified Financial Planner™ (CFP®), Life Underwriter Training Council Fellow® (LUTCF®), Certified Elder Planning Specialist (CEPS) designations, and Life and Annuity Certified Professional (LACP)
- Holds securities licenses; Series 6 (Investment Company Products/Variable
- Contracts Limited Representative), Series 7 (General Securities Representative), Series 63 (Uniform Securities Agent) and Series 66 (NASAA Uniform Combined State Law Exam)
- Licensed for life, health, and property/casualty insurance since 1985

Talks and Topics Jim Presents

- Long-Term Care Planning
- The Family Meeting
- Roth Conversion Strategies
- Life Insurance Opportunities
- Growing Your Business
- Charitable Planning
- Strategies for the Middle Class Millionaire
- Creating Relationships
- Ethics in Finance Planning
- Basic Estate Planning
- Keys to Success in a Small Market
- Middle America Money Management
- Educational Marketing Strategies

Speaking and Publications

Jim is both a nationally and internationally recognized speaker. He has spoken for many industry organizations, advisor study groups, and company training events. He has been quoted in industry books, published in industry publications, and interviewed by numerous financial industry leaders.

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