

Meet Jim Collier

Author, Educator, Presenter, Storyteller



Jim Collier is uniquely qualified as an industry authority on contemporary retirement planning topics. As a financial adviser who is a CERTIFIED FINANCIAL PLANNER[™] professional, Jim established himself in 1985 as a “go-to money pro” within his community and consistently grew his financial planning business during three decades that included both historic economic growth and decline.

In addition to his long-time experience as an accomplished financial adviser, Jim successfully completed a family business succession, turning the business over to his son, Brandon, who had been his business partner for thirteen years.

In 2017, Jim retired from the family business and founded RetirEd LLC, a retirement-planning education company not affiliated with any outside company or organization. Now a full-time writer, educator, and presenter, Jim advocates for improvements to the dreadfully low financial IQ prevalent across all age groups and promotes the partnership between willing participants and professional financial advisers. Jim’s book, *Retirement is Recess for Grown-Ups*, is receiving applause and high acclaim from both the professional and public communities as an invaluable educational resource for the new-era challenges of a multidecade retirement.

Featured Presentations

Retirement is Recess for Grown-Ups—When the bells rings, will you be ready?

Encouraging the need for actionable, noncommercial, retirement-readiness knowledge, Jim takes a fresh look at the evolution of the retirement story and why traditional planning strategies and the “gold watch” are now relics. Jim introduces the audience to seven essential traits common to the financially independent retiree.



From Both Sides Now

Jim shares his unique experience about how retirement transition feels from the client side of the conference table rather the financial adviser’s chair. Hear from this thirty-two-year retirement planning veteran about how the retirement experience is as much about feelings as it is finances. Learn why retirement planning professionals must heed the call for greater empathy by offering clients a process to answer a three-part lifestyle-decider question: What do you want to *be*, *do*, and *have* during what could be a three- to four-decade retirement?

Suitable audience: Industry Associations, Corporations, Colleges, Financial Adviser client groups



Hire Jim

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Jim is available upon request for groups of any size. For more information about scheduling, costs, and customized presentations to fit your group's message objectives, email jim@retirementrecess.com.

Visit Jim at: www.retirementrecess.com.

Bio—Introduction

A lifetime career is launched

Jim Collier began his career as a financial adviser in 1985. Located in Denver, Colorado, Jim pioneered the development of noncommercial employee “lunch and learn” financial education programs. He conducted a variety of education-based workshops for area businesses and associations and promoted the need for long-term, goal-based investing and a written financial plan. As a result, Jim's business grew rapidly.

Independence achieved

Earning his CERTIFIED FINANCIAL PLANNER™ professional designation in 1991, Jim founded Collier Financial in 1995. As an independent financial adviser, Jim continued to grow his education-based financial planning business, which was unaffected by outside economic conditions. In addition, Jim designed and conducted bank financial adviser sales training programs from 1994 through 2006 for a regional financial services company serving a network of community banks throughout the upper Midwest.

A plan for the future

In 2004, Jim's son, Brandon, joined Collier Financial, positioning himself for a future succession to the family business. Brandon assumed the role of managing principle of Collier Financial in 2010, taking ownership of the company in 2015. In addition to receiving other accolades, Brandon was recognized by *Forbes* magazine as one of the “Top Next-Generation Wealth Advisors” in 2017. Jim's vision of a successful family business succession was realized.

Retirement recess

On October 31, 2017, Jim retired from Collier Financial. In the same year, he founded RetirEd LLC, a nonaffiliated retire-ready education company. As an author, educator, presenter, and storyteller, Jim helps people—and the financial advisers who serve them—launch their dreams, and he helps keep them afloat on the sea of longevity.

Jim's popular book, *Retirement Is Recess for Grown-Ups*, was published in 2018.

When not advocating the advancement of better retirement-preparation education, Jim and his wife, Carol, enjoy the enchanted forests and small mountain town of Larkspur, Colorado, where they live and spend time with their two young grandchildren who, with Grandpa's encouragement, have already established their retirement accounts.