JAMES E. WILSON, CFP

J.E. Wilson Advisors, LLC

2431 Devine Street
Columbia, SC 29205
803-799-9203
james@jewilson.com

BIOGRAPHY

James E. Wilson received his undergraduate education in Economics at the University of South Carolina. He then completed the postgraduate study in investments, taxation, estate planning, insurance and retirement planning leading to the Certified Financial Planner (CFP) professional designation. In 1982, Mr. Wilson formed South Carolina's first comprehensive fee-only financial planning and investment management firm.

He is a past president of the National Association of Personal Financial Advisors (NAPFA), the primary professional association for fee-only financial advisors. Mr. Wilson also served for four years as a member of the Board of Governors of the Certified Financial Planner Board of Standards. From 1990-1992, he served as a member of a Blue Ribbon Committee for the South Carolina Securities Commissioner to review South Carolina securities laws. He also served as President of the Consumer Financial Education Foundation. Mr. Wilson was President for two terms of the Bald Head Association (Bald Head Island, N.C.). Since 1994 he has been a member of the Board of Advisors of Priestly Fraternity of St. Peter and chairs the Financial Management Group of the Board. He was selected as one of the top 60 financial advisors in the United States by Worth magazine in 1994 and again in 1996, 1997 and 1998 by Worth as one of the top 200 financial advisors. He also was named by Medical Economics as one of the top financial advisors for doctors in 1998, 2000, 2002, 2004 and 2006.

PUBLISHED ARTICLES

Personal Financial Planning (A Warren, Gorham and Lamont Publication), "A Critical Look at Wrap Fee Accounts" Jan. 1992
The State Newspaper Bi-Weekly Column--Business South Carolina, Aug. 1987--May 1991
Personal Financial Planning (A Warren, Gorham and Lamont Publication), "Education Funding Strategies and Techniques"
Business & Economic Review, "Choosing a Financial Planner" Oct. 1989
Business & Economic Review, "Life Insurance and Mutual Funds--Let the Buyer Beware" Oct. 1988
Business & Economic Review, "Tax Changes in Your Retirement" July 1988
Business & Economic Review, "Tax Strategies--Financial Planning Abuses" Jan. 1988
Business & Economic Review, "Master Limited Partnerships" Oct. 1987
Business & Economic Review, "Life Insurance After Tax Reform" July 1987
Business & Economic Review, "A Time for Attention and Transition" April 1987
Venture Magazine, "Breaking Up Frozen Assets" Feb. 1987
Business & Economic Review, "Tax Revision--Version 1986" Jan. 1987
Business & Economic Review, "Investment Monitoring--The Missing Link" Oct. 1986
Business & Economic Review, "The Good and Bad News of Tax Revision" Oct. 1986
Business & Economic Review, "IRAs Revisited" July 1986
Business & Economic Review, "Baby Bommers In Retirement" April 1986
Venture Magazine, "Partnership Buy/Sell Agreements" Jan. 1986
Business & Economic Review, "Divorce Settlements" Jan. 1986
Business & Economic Review, "Welcome Changes in the Financial Services Industry" Oct. 1985
Venture Magazine, "Rewarding Inventors" Oct. 1985
Business & Economic Review, "Tax Strategies for the 80's" July 1985
Venture Magazine, "Two Cheers for Home Offices" July 1985

ARTICLES CONTRIBUTED TO

The Wall Street Journal – "Ask Encore (Tackling Questions on Medicare Plans, Social Security and Savings Bonds)" September 22, 2007
The Wall Street Journal – "Make the Most of Your Benefits Package" July 2, 2006
The Wall Street Journal – "Check Your 401(k)" June 25, 2006
The Wall Street Journal – "Ask Encore (Advice on personal records, homes and Social Security)" June 27, 2005
The Wall Street Journal – "Reinvesting At Year End Poses Choices" November 12, 2004
The Wall Street Journal – "Mutual-Fund Losses May Help to Reduce Future Tax Payments" October 29,2004
The Boston Globe, "Real Estate Sector Could Burn, Too" Feb. 9, 2003
The Wall Street Journal , "By One Market Stock Funds Aren't Doing All That Badly" Oct. 18, 2002
Physicians Financial News, "Money Manager Can Play a Key Role." Aug. 15, 1998
The Boston Globe, "Experts Unsure if Fund Investors Win Flee" Aug. 7, 1998
Modern Maturity, "Framing a Secure Retirement." July/Aug. 1998
The Wall Street Journal , "When selling stocks, consider portfolio's long term health" Nov. 12, 1997
The Wall Street Journal , "Mutual-fund Holders flock to refuges" Oct. 28,1997
The State, " Planners worth mentioning." Sept. 21, 1997
The Washington Post, "Line Between Fee-Only Blurred" Sept. 16, 1997
The Wall Street Journal , "Wide Swings in Your Income Can Be Nerve-Wrecking" Oct. 20, 1996
Worth, "The Best 200 Financial Advisors" Oct. 1996
The State, "Wilson Advisors Makes List" Sept. 18, 1996
The Wall Street Journal , "Zero-Coupon Bonds Offer Safety Net With a Bounce" May 29, 1996
Financial World, "Municipal Bombs" Apr. 8, 1996
Physician's Practice Digest, "Finding Your Way to a Successful Financial Future" Winter 1996
The Wall Street Journal, "Breaking Up With Your Broker Can Be Hard to Do" Jan. 19, 1996
The Wall Street Journal , "Mutual Funds Rivalry Doesn't Include Giving Buyers a Break on Fees" Nov. 28, 1995

PUBLISHED ARTICLES *(cont'd)*

Venture Magazine, "Employing Your Children" May 1985
Venture Magazine, "A Revised Method to Shift Income" April 1985
Business & Economic Review, "Tax Shelter Investing" April 1985
Business & Economic Review, "Avoiding Investment Mistakes" Jan. 1985
Business & Economic Review, "New Risk--Tax Law Changes" Oct. 1984
Business & Economic Review, "Tax Shelters in Transition" July 1984
Venture Magazine, "Scrutinizing General Partners" July 1984
Business & Economic Review, "A Fast Growing Perk for Executive Employees" April 1984
Venture Magazine, "Abandoning a Tax Shelter" Feb. 1984
Business & Economic Review, "Tax Aspects of Divorce for the Business Owner" Jan. 1984
Venture Magazine, "Net Leasing Property" Nov. 1983
Business & Economic Review, "Tax Planning Potpourri" Oct. 1983
Venture Magazine, "Historic Rehabilitation" Sept. 1983
National Tax Shelter Digest, "The Need for Objective Advice" April 1983

ARTICLES CONTRIBUTED TO *(cont'd)*

The State Newspaper, "Future of S.C. is Aging Baby Boomers" Nov. 22, 1995
The Wall Street Journal , "Cost Creep" Nov. 28, 1995
The Wall Street Journal , "Is There a Santa Hiding in Your Stockbroker?" Dec. 16, 1994
The Wall Street Journal , "Lock-In Market Returns" Dec. 14, 1994
New York Times , "Who Gets More-Your Heirs or the IRS?" March 26, 1995
The Wall Street Journal , "You Need a Translator" Feb. 4, 1994
Business Week, "Buying Your Heirs a Trustier Tax Shield" Jan. 10, 1994
Worth Magazine, "Concealing the Conflicts" Dec./Jan. 1994
The Wall Street Journal , "Relying on a Referral" Sept. 17, 1993
The Wall Street Journal , "What You Don't Need to Know About Investing" July 23, 1993
The Wall Street Journal , "How to Start Taking Control of Your Finances" Jan. 28, 1993
The Wall Street Journal , "Wrap Accounts Prove Popular But They Can Be Costly" Jan. 28, 1993
Financial World, "Frank Advice From the Experts" Nov. 24, 1992
The Boston Globe, "A Planner By Any Other Name" May 7, 1992
Worth Magazine, Later In Life Dads Take Note--You're All Set, As Long As You Have A Bundle"
May 1992
The New York Times, "Financial Planners Debate How They Charge Clients" May 23, 1992
The Boston Globe, "Sell and No Tell Planners Face Disclosure Rules" March 28, 1991
The Wall Street Journal , "Some Muni Holders Trade Up For Safety" Dec. 6, 1990
The Wall Street Journal, " Life Insurance Buyers May Find Agents Commission is Negotiable"
March 24, 1990
The Wall Street Journal , "Conflict of Interest Issues Cloud Financial Planning" March 22, 1990
Changing Times, "What If You Couldn't Work Anymore?" Aug. 1990
The Wall Street Journal , "Holders of CDS Advised to Look at Munis Funds" Oct. 30, 1989
The Wall Street Journal , "Legg Mason Makes Thanksgiving Picks Despite Lean Harvest" Nov. 24, 1989
The Wall Street Journal , "Savings Bonds Regain Some Lost Luster" Dec. 28, 1989

PUBLIC SPEAKING AND WORKSHOPS

Benefits Seminar - U.S. Department of Labor and the Internal Revenue Service
University of South Carolina College of Business Administration, "The Graying of
South Carolina: What You Should Know About Retirement"
University of South Carolina Economic Outlook Conference (3 times)
IBCFP Practice Standards Presentation (Miami, Atlanta, Boston, New York, and
Philadelphia)
International Association for Financial Planning (New Orleans and Atlanta Chapters)
International Business Communications Seminars (New York City and Los Angeles)
National Association of Accountants (Columbia Chapter)
Charles Schwab Investor Workshop (Atlanta and Columbia)
National Association of Personal Financial Advisors
Financial News Network-Tax Strategies (New York)
Sports Seminars, Inc. (New York)
Richland County Bar Association
Orangeburg Medical Society
Columbia Tax Study Group
Columbia Dental Society
Carolina Business Review
CNBC "The Wall Street Journal Money Summit"
USC School of Medicine