

Biography

James A. Lavorgna, J.D., LL.M., CWM, CTEP, CFP

Financial and Estate Planner

Distinguished Fellow – Royal Society of Fellows

Fellow – American Academy of Financial Management



Current Practice

Mr. Lavorgna works directly with clients and their advisors to provide wealth management services including investment advisory services, financial planning, accounting, tax, asset protection, and estate planning services in both domestic and international markets. He is the President & CEO of Forsyth Wealth Management, Inc., a Registered Investment Adviser and Business Services International, Inc., an international tax and wealth management advisory company. Business Services International, Inc. also provides wealth management instructional courses for the American Academy of Financial Management and the Royal Society of Fellows.

Experience

Starting in the financial services industry in 1976, Mr. Lavorgna has provided extensive financial and estate planning services to professional athletes, high net worth individuals and business owners. He also works with non-profit organizations and clients that have an interest in charitable giving, family wealth planning, and asset protection.

Mr. Lavorgna provides goal based wealth management services for clients wishing to grow, protect and conserve their wealth currently and for future generations. He also provides global estate planning; asset protection planning through domestic and offshore financial centers; and has planning experience designing offshore structures and international private placement life insurance.

Mr. Lavorgna holds law degrees from three different law schools: a Master of Laws in International Taxation with a concentration in Wealth Management and Private Banking from the Thomas Jefferson School of Law (Magna Cum Laude), a Master of Laws in International Taxation with a concentration in Offshore Financial Centers from the St. Thomas University School of Law, and a Juris Doctor with a concentration in Litigation from the Thomas M. Cooley School of Law.

He was an adjunct professor for investments and financial planning at Sussex County Community College during the 1980's and currently teaches accounting, computerized accounting and business law, a course he developed for the Patrick Henry Community College distance-learning program. He was a thesis promoter and teaches international tax credits as an adjunct professor for St. Thomas University School of Law Masters of Laws Graduate International Taxation program. He now teaches as an adjunct professor for the Diamond Graduate International Tax Program at the Thomas Jefferson School of Law. He is also a Certified Instructor for the American Academy of Financial Management and currently teaches the Chartered Wealth Manager and Chartered Trust and Estate Planner designation courses.

Mr. Lavorgna has been a financial planning radio talk-show guest, an international public speaker (recently speaking in the Bahamas, Cayman Islands and Barbados), has been quoted in trade publications, and has independently published numerous articles. He has written the *Anguilla* Chapter for the Offshore Financial Centers Database for Richmond Publishing, London and is currently completing a book on financial planning and investing called *Educated Investing*. He also writes articles for ProducersWeb.com, a web magazine for professional financial advisors with a membership of over three hundred thousand. He is listed in the National Register's Who's Who in Executives and Professionals 2001-2002 edition and has been listed in the 2005-2006 "Guide to America's Best Financial Planners" published by the Consumers' Research Council of America.

Education and Personal Designations

Master of Laws in International Taxation - Concentration in Wealth Management and Private Banking

Master of Laws in International Taxation - Concentration in Offshore Financial Centers

Juris Doctor - Concentration in Litigation

Bachelor of Science – Finance

Associates in Arts – Business

Certified Financial Planner

Chartered Wealth Manager

Chartered Trust and Estate Planner

Master Financial Professional

Distinguished Fellow – The Royal Society of Fellows

Fellow – American Academy of Financial Management

Affiliations

Royal Society of Fellows

Licenses

NASD - Series 7, 24, 63.

State Insurance Licenses