

James Makee Executive Vice-President & Partner



Contact James Makee

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Jim Makee has built his financial career around Four Core Beliefs: 1) Wealth is built over time. Jim prioritizes long-term growth opportunities rather than short-term market fads. 2) Planning is the cornerstone of Jim's process. Jim takes the time to learn his clients' values, goals, and what their priorities are before making any recommendations. 3) Creating a reliable income stream to cover basic living expenses is essential. Jim believes this allows clients to sleep better at night and identifies extra assets that can be deployed differently to achieve charitable gifting and estate planning goals. 4) Family, Honesty, Integrity, and Pride. These values are at the heart of Jim's philosophy in both life and business.

Jim has been married to his beautiful wife Jill since 1991. Together they raised two children, Lilly and Jack, who are now grown, married, and starting families of their own. Family is the cornerstone of Jim's life. Jim and Jill are passionate about travel and giving back to their community.

Jim's love for aviation began at the age of 13 years, when he took his first flying lesson at

Cuyahoga County Airport. That experience sparked a lifelong passion, eventually leading him into becoming an instrument-rated pilot. Today, Jim serves as a volunteer on the Geauga Airport Board Authority and is an active member of the Experimental Aircraft Association where he is a Young Eagles Pilot. Through the Young Eagles program, he introduces children to the world of aviation by offering complimentary flights. In addition, Jim is a mission pilot for Patient Airlift Services where he provides no-cost transportation to patients and their families who need medical care. Finally, Jim serves as the AOPA ASN Volunteer, where he interacts with local Geauga County pilots and the airport board authority. He is a member of the Geauga Aviators Club.

Through Jim's work in finance, aviation, and community service, he strives to make a lasting impact on the lives of others. Whether guiding families toward financial freedom, mentoring the next generation of aviators, or volunteering his time to those in need, he remains dedicated to living out his values in everything he does.

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