ORBA®
Accounting | Tax | Advisory

JAMES PETITPREN, II

EXECUTIVE PRIVATE WEALTH ADVISOR & CHIEF INVESTMENT OFFICER

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As the Executive Private Wealth Advisor and Chief Investment Officer at ORBA Wealth Advisors, James leads the wealth advisory team in developing, coordinating and providing resources to assist our clients in reaching their goals.

James coordinates the firm's portfolio strategies, planning strategies and resources to ensure that clients are receiving custom solutions that enhance their goals-based planning needs.

In the 20 years prior to partnering with ORBA Wealth Advisors, James held positions at well-established financial institutions in the wealth management role. His career began as an Investment Associate with Merrill Lynch, moving on to become an Investment Advisor at Morgan Stanley Smith Barney, then Vice President – Wealth Strategist at Northern Trust, and most recently as a Private Wealth Director at BMO Private Bank.

Working inside two of the oldest global banks, Northern Trust and BMO, and two of the world's most influential investment banks in Merrill Lynch and Morgan Stanley Smith Barney, James gained knowledge and experience managing money for generational wealth – the "Wisdom of Wealth" – with a lens on investment excellence – "Investment IQ".

Unlike many Wealth Advisors, James also worked outside the financial sector for six years in the area of electrical, electronic and embedded engineering product development. This sabbatical from banking forever changed his perspective on managing wealth because he was able to experience living life through the lens of the client. James feels it is his personal responsibility to make sure that the individuals, families and corporations who entrust him with their wealth creation story receive great counsel and service when working with an advisor on their growth, capital preservation and transfer planning.

PROACTIVE

James prides himself on his dedication to designing solutions for clients that require creativity, collaboration and communication. He believes that when advisors are engaged, they are able to look past the surface and dig deep into the core specifics for solutions. Additionally, they are able to study what has been discovered to deliver perspective and guidance that is unique to that client's world.

OUTSIDE OF THE OFFICE

James is a Maryland born, Michigan raised Illinois resident who resides with his wife and three sons in the Lincoln Park neighborhood. James is actively involved in youth sports programs in Chicago and enjoys spending time with his family and friends. James can typically be found outside the office sailing, golfing, fly fishing or coaching youth sports. Outside of reading financial market information, he enjoys reading about technology, history and random paperbacks in the sun.

SERVICES

Goals-Based Planning
Asset Management
Tax-Managed Strategies
Wealth Trander Strategies
Risk Mitigation/Insurance
Philanthrophy & Gifting

MEMBERSHIPS AND AFFILIATIONS

- Board Member - Hamlin Park Baseball Association - Vice President
- Volunteer – St. Andrews, Big Shoulders, and McFedridge Ice Arena

CERTIFICATIONS AND LICENSES

- Illinois Life and Health Insurance License
- Series 7 General Securities Representative Examination
- Series 66 Uniform Combined State Law Examination

EDUCATION

- B.S., Finance, Michigan State University
- Asian American Business, University of Hawaii
- Currently Enrolled, Certified Financial Planning Program, Northwestern University