



**James A. Whisman, Jr. CPA, CFP®, AEP®**  
Certified Public Accountant, Certified Financial Planner, Accredited Estate Planner

## Background and Experience

### ***Working with Community Organizations:***

- Extensive experience working with management of many community organizations.
- Expert in financial planning, investments, taxes, estate planning, and accounting.
- Business owner since 1973.
- Founder of Colonial Financial & Tax Services, LLC at 700 Delaware Street in 2010.

### ***Leadership Positions include:***

- Chairman, Delaware Chapter of American Red Cross.
- President, Chadds Ford Historical Society.
- President, Estate Planning Council of Delaware.
- Treasurer, Has Served with Several State and New Castle organizations.

### ***Personal Background:***

- Moved to New Castle in 1950 and attended William Penn High School.
- Moved away in 1967 and returned in 2008.
- Attended college and majored in business and finance.
- Lives at 10 Dalby Alley with my wife Barbara.

### ***Military Service:***

- Served in the Delaware National Guard, New Castle Van Dyke Armory, for 6 years.
- Active duty with the 1049th Army Aviation Company during the Berlin Crisis.

### ***Hobbies include:***

- Hiking and biking with friends and with the Wilmington Trail Club.
- Volunteering at New Castle Courthouse Museum for historical programs.
- Teaching at the Kalmar Nyckel Foundation for students and visitors.

**[Text or Call me on my Cell: 302-383-9741](tel:302-383-9741)**

**[Email: whismancpa@aol.com](mailto:whismancpa@aol.com)**