

Meet

JAMES MOORE

Marketing Director, Edmonton, Customplan Financial Advisors Inc.



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James Moore brings 38 years of expertise in financial services, specializing in retirement and estate planning. Throughout his distinguished career, he has consistently helped clients achieve their financial goals and secure their futures.

James is a multiple-time qualifier for the Million Dollar Round Table (MDRT), including Court of the Table honours — a reflection of his outstanding service, expertise, and trustworthiness in the industry.

In addition to his client-focused work, James has excelled in training and mentoring financial advisors. He has a proven record of recruiting, developing, and leading high-performing teams across various organizations, driving growth and delivering exceptional service.

Passionate about preserving legacies and navigating financial complexities, James remains dedicated to empowering individuals and families to protect and enhance their financial well-being.

Contact James directly at jamesm@customplanfinancial.com

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CUSTOMPLAN
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8:00 AM – 4:30 PM MT