James J. Tyrpak, MSFS, CLU®, ChFC®, AEP®
Tyrpak Wealth Strategies, Williamsville, NY

Jim has more than 35 years of experience in the financial planning field. He has a Master of Science in financial services with specialties in estate planning and pension planning.

Jim has earned an Accredited Estate Planner® (AEP®) designation which is a graduate level specialization in estate planning. This designation is awarded by the National Association of Estate Planners & Councils (NAEPC) and recognizes estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character, and who commit to the team concept of estate planning.

Jim's expertise in estate planning includes:

- Analyzing existing life insurance coverage for continuing relevance
- Analyzing proposed transactions for estate and gift tax implications
- Charitable and gift planning
- Designing estate plans
- Designing Qualified and Non-Qualified Retirement Plans
- Developing strategies to minimize potential estate and gift taxes, including generation skipping taxes
- Developing programs to conserve assets during lifetime and at death
- Leading clients through a discovery process to determine the ultimate purpose they want their wealth to accomplish for them, their families and the institutions and causes they care about most.
- Preparing estate and gift tax returns, including generation skipping tax returns
- Proposing life insurance solutions consistent with estate plans
- Retirement distribution planning
- Succession planning

Jim attended Purdue University's Pension Planning and Marketing School and received a Specialty in Pension Planning from the American College in Bryn Mawr Pennsylvania. With this knowledge and years of experience he helps clients design and implement retirement plans including 401k and profit-sharing plans, primarily for closely held businesses.

Jim is heavily involved in his profession and the community. He is the past national president and board member for the Society of Financial Service Professionals (FSP) and past chairman of the Society of FSP Foundation. Jim is also a past president of the Buffalo Rotary Club and Buffalo Rotary Foundation. Jim has served as past president of the National Association of Insurance and Financial Advisors (NAIFA) Buffalo Chapter and past president of Financial Planning Counselors of Western New York (WNY). Additionally, Jim served as a board member of the WNY Planned Giving Consortium. Jim is currently on the board of the Buffalo Naval Park and Vice President of WNY Estate Planning Counselors.