

# CALPRO



## **Jim Gates**

CALPRO Network  
Sr. Financial Advisor

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## **Experience and Licenses**

Jim Gates is a Sr. Financial Advisor at CALPRO Network. He works closely with both individual and corporate clients on investment reviews and retirement planning. He has extensive knowledge of public pension and retirement plans.

Jim is dedicated to forming warm, productive client relationships that create strong connections. He's committed to helping individuals and business owners feel more confident about safeguarding their families and realizing their goals. He is equally thrilled to work with a successful business transition to the next generation, a client who embarks on a secure retirement, or parents who are saving for their child's college education.

Jim joined the CALPRO Network team in 2012. Prior to that, he owned BMS Financial Solutions for 12 years.

## **Accolades and Personal Interests**

Jim served in the United States Army and a Veteran of the Gulf War and Desert Storm. In his free time, he enjoys some high-octane outdoor activities, including sportfishing, e-mountain biking, and dirt biking around San Diego County.