

as featured in
minnesota
BUSINESS
magazine

FINANCE

PHILLIP CHRISTENSON

AGE: 32

ABOUT: Co-founder, financial advisor and portfolio manager of Phillip James Financial, an independent wealth management company focused on pre-retirees as well as providing advisement for younger generations.

Phillip James Financial was started by Phillip with his grade-school friend, James Sexton. They used to trade stock picks while in high school at Totino Grace in Fridley, MN. Their combined expertise (James is a CPA) allows them to provide comprehensive financial planning that is hard to find at other firms. They also have an affiliated tax practice, PJFTax, which serves their wealth management clients, allowing them to have their taxes and finances integrated.

QUOTE: "Our company motto is 'Investing with Purpose.' This reflects our belief in building long-term relationships with our clients and getting to know their reason for investing. Everyone has a purpose, we want to understand this and build a client's comprehensive plan and investments around it."

INSPIRATION: "Definitely my parents. They ran a local bar restaurant growing up. They worked their butts off. That's what it takes to run a successful small business."

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PHILLIP JAMES FINANCIAL

• INVESTING WITH PURPOSE •

