

A Legacy Built on Integrity. A Practice Built on Advocacy.

Jim Billington didn't just enter the financial world he was *raised* in it. As the son of a founding partner of Merrill Lynch, Jim grew up watching what real fiduciary responsibility looks like: trust, loyalty, and a client-first mindset that defined an era of Wall Street leadership.

When Wall Street Lost Its Way, Jim Stepped In

After a decorated executive career in healthcare, Jim returned to finance when he saw something he couldn't ignore: **the erosion of the very trust his father helped build.**

Following Bank of America's acquisition of Merrill Lynch, Jim uncovered systemic failures that devastated the financial security of his father's colleagues and clients. Instead of looking the other way, he did what true leaders do he fought back.

The \$1.1 Billion Stand Against a Giant

Jim became the lead advocate in a massive **\$1.1 billion battle** against one of the world's largest banks. [Read The Full Story.](#)

He became the voice for people who had been ignored, defrauded, or dismissed and he delivered:

- **Major out-of-court settlements**
- **Recovered assets for dozens of families**
- **Accountability from an institution that thought it was untouchable**

What That Means for You

When you work with Jim, you're not hiring another advisor. You're partnering with someone who has:

- **Stared down a global financial powerhouse**
- **Won meaningful justice for real people**
- **Proven he will go to extraordinary lengths to protect those he serves**

Jim brings that same "David vs. Goliath" tenacity to every client relationship. To him, you're not an account you're **a legacy worth defending.**

“Most advisors talk about assets. I talk about trust.”

Jim's mission is simple: **Protect your family's future with the same intensity he used to protect his own.**