



JAMES LEE Earns CERTIFIED FINANCIAL PLANNER™ (CFP®) Designation

Contact: James Lee, CFP®
Phone: 518-580-0088

For Immediate Release

Saratoga Springs, NY, December 17, 2014 – James Lee, President of Lee Investment Management LLC in Saratoga Springs, NY has earned the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation from the Certified Financial Planner Board of Standards (CFP Board).

Earning the designation requires at least three years of qualifying full-time experience as a financial planner, successful completion of a CFP® Board-registered education program or equivalent, and a passing score on the CFP® Certification Examination. The CFP® is the highest professional designation in the financial planning field.

Mr. Lee has been providing comprehensive financial planning and investment management services to family and business clients since 1998.

“It is important for existing and future clients to know they are working with a professional that meets rigorous experience, education and ethical requirements,” Lee said. “The CFP® mark serves as the gold standard for personal financial planning.”

CFP Board is a nonprofit certification organization with a mission to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning. CFP Board currently authorizes approximately 70,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net.

Lee Investment Management is an independent, fee-only financial planning and investment advisory firm. Lee Investment Management provides its clients with strategies and solutions to meet their financial goals. These goals may encompass retirement, education, insurance, tax and estate planning. For more information about Lee Investment Management, visit www.leemgt.com.