



KUHN DILLON UмбаUGH <sup>L</sup>/<sub>C</sub>

## James B. Dillon

Partner

(574) 936-9910  
2901 Miller Drive, Suite B  
Plymouth, IN 46563

jdillon@kduemail.com  
www.kduinfo.com

### *Adding Perspective to Numbers*

Born and raised in La Porte, Indiana, Jim began his career in financial services as a financial advisor with Raymond James and Associates in Mishawaka, Indiana in 2006. In 2009 he partnered with Jeff Umbaugh to form Dillon-Umbaugh Wealth Management in Plymouth. Jim has previously served on the Edison Lakes Rotary board of directors, St. Joseph County Chamber of Commerce Ambassadors, and as chapter president of BNI in Goshen.

As a financial advisor with KuhnDillonUmbaugh, one of Jim's specialties is helping clients identify their own perspective of what retirement is. He is passionate about educating clients and breaking down financial lingo and concepts into everyday language that people can understand and remember.

Jim received his BA in organizational communication from the University of Montana and spent nearly twenty years in sales and management in the communication technology field for companies in South Bend and later Kalamazoo, Michigan.

Jim, along with wife Diane and son Matthew, reside in Plymouth. Jim enjoys the outdoors, working around the house and is a life-long, die hard Chicago Cubs fan.



"I prefer to think of the client as the one who is in control in the process of financial planning. My role is to act more as a CFO to generate ideas and strategies that they can use to get them closer to their goals. If they don't accept an idea—then it's my job to come up with something else." - James B. Dillon

### Education:

University of Montana