



James L. Hicks, CFP®, ChFC®, ChSNC®, CFBS, CLU®, MBA
Member Wealth Management at the USPS Federal Credit Union
Financial Planner
Office Phone: (703) 394-7176



Knowledge is the key to a successful financial future. My background, experience and commitment to providing you with the resources you need to make financial decisions, can help make your financial future as successful as you need it to be. I pride myself in getting to know each credit union member so that I can understand their individual needs and what matters most to them. This helps me recommend products and strategies designed to meet their current needs, and more importantly, their future needs.

James, who is more commonly called “Jimmy,” is a CERTIFIED FINANCIAL PLANNER™ professional with Member Wealth Management, located at the L’Enfant Plaza Branch of the USPS Federal Credit Union. Jimmy’s broad knowledge of insurance and investment products can give his clients the confidence they need when working with a financial planner.

Jimmy is a graduate of the Darden School of Business at the University of Virginia, which is also where he earned his undergraduate degree. He is a member of the National Association of Insurance and Financial Advisors (NAIFA), Million Dollar Roundtable, The C12 Group, and a member of the Falls Church City Chamber of Commerce.

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