

# 40 FORTY 2016



## ★ James A. Valis ★

*Owner & founding partner,  
Blackstone Valley Wealth Management, Hopkinton*

**Residence:** Hopkinton • **Birthplace:** Worcester

**Colleges:** Worcester Polytechnic Institute, Bryant University,  
College for Financial Planning

Upon receiving his master's degree in business administration in 2002, Valis joined Fidelity Investments, quickly rising to vice president of the private client group, advising high-net-worth clients. After becoming a certified financial planner, Valis exited the corporate world in 2013 to co-found Blackstone Valley Wealth Management, representing businesses, nonprofits, trusts and individuals.

Valis works to grow the practice and the team at Blackstone. He remembers those who helped pave the way for his success and works to pay it forward.

### **Whose career would you like to emulate?**

Perhaps not any one person, but to successfully emulate work-life balance, enriching the lives of others and making a positive impact.

### **What should older generations know about the up-and-coming workforce?**

We remember those who came before us, we honor their work ethic and the sacrifices they endured.

### **I prepare for the unexpected by...**

being ready. It's not necessarily what happens, but how to react to it.

### **If you could have dinner with any four people, who would they be?**

Warren Buffett, Al Pacino, Vince Lombardi, Jim Valvano. ■

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