

# Tompkins Financial Advisors

## News Release

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**For Immediate Release:**

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WITH PHOTO – Jim Sperry.jpg

### **Tompkins Financial Advisors Names Managing Director**

**Pittsford, NY** – Tompkins Financial Advisors is pleased to announce that James “Jim” Sperry has been promoted to senior vice president and managing director for the western New York market. His office is based in the western New York office, located at 179 Sully’s Trail in Pittsford, NY.

In his new role, Sperry is responsible for establishing and executing the wealth management strategy for the western New York region. “I’m proud to have been a part of the Tompkins family for the past seven years, and I look forward to continuing the tradition of ensuring that clients receive the highest level of care,” Sperry said.

Sperry has more than 20 years of experience in consulting, business development and new venture creation. Prior to his new role, he was vice president of Tompkins Insurance Advisors and directed the risk management group where his primary role was to lead the growth of that practice area. He worked with high net worth families, executives and business owners to help them protect and grow their assets, transition their businesses, and secure their legacies.

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Sperry -add two-

Sperry earned his Bachelor of Arts degree with Honors in geosciences from Williams College in 1987, his Ph.D. in engineering from Duke University in 1997, and his MBA from the Simon Graduate School of Business Administration at the University of Rochester in 2002. He holds the FINRA Series 6, 63, and 65 registrations, a Life and Health Insurance license in numerous states, as well as appointments for Long Term Care, including New York State Partnership for Long Term Care.

Sperry currently serves as chair of the board of directors, Volunteers of America Upstate New York. He also served as president of the Rochester Regional Alumni Association of Williams College.

He and his family live in Brighton, NY.

**About Tompkins Financial Advisors:**

Tompkins Financial Advisors is the wealth management firm of Tompkins Financial Corporation, a leading New York State-based financial services holding company. With more than a century of experience in helping clients to build, protect, and preserve wealth, Tompkins Financial Advisors provides financial planning, investment management, trust services and estate administration. The firm has regional offices in White Plains, Rochester, Ithaca and southeastern Pennsylvania. Wealth advisors are also available by appointment at Tompkins Financial affiliate locations including Bank of Castile, Mahopac National Bank, Tompkins Trust Company, VIST Bank and Tompkins Insurance Agencies. For more information, visit [www.tompkinsfinancialadvisors.com](http://www.tompkinsfinancialadvisors.com) or follow us on LinkedIn [www.linkedin.com/company/tompkins-financial-advisors](http://www.linkedin.com/company/tompkins-financial-advisors).

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