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James J. Kelly Jr.

CEO – Atlantic Advisors, LLC
Investment Adviser Representative

James joined John Hancock Mutual Life on January 8th, 1984, as representative with the Sayreville Agency of New Jersey. Throughout his 6 years as a financial advisor, James achieved several awards including Top Producer his first year, Rookie of the year, The Million Dollar Round Table (MDRT), the John Hancock Honor Club, the John Hancock Presidents Club, and the Prestigious Century Club, as well as regional honors and recognition.

In 1989, James embarked on a career path in management and the development of advisors. During the next 9 years, he spent his time in the field assisting advisors with their clients, recruiting new advisors to the industry, as well as teaching, developing, and retaining those advisors. Many of these advisors today, lead the field and our industry both with John Hancock/JHFN/Signator Investors, Inc, as well as other firms and broker/dealers throughout the industry. Along the way James consistently achieved the Sales Manager Recognition Conference Award including the “Top 5” level ranking for development and retention of advisors.

In September of 1999, James transferred to Long Island, NY and was appointed associate managing partner of the Eastern Long Island Agency of John Hancock. In July 2001, James was named acting General Agent and Managing Partner at Eastern Long Island Agency. In 2002, through a merger acquisition, James founded Eastern Partners Financial Group. Eastern Partners Financial Group would come to be known as one of the fastest growing organizations in the John Hancock network. On March 8, 2009 Eastern Partners began a merger acquisition of NY Camps Agency and created a new firm called Atlantic Partners Financial Group, LLC. That merger/acquisition proved to be a highly successful alliance which achieved many network and national awards as a leader in growth, total gross sales, as well as brokerage including winning these awards all in the same year. From 2008 through 2011, the Atlantic family of advisors garnered many top awards and achievements both as a firm and as individual advisers.

In 2012, Atlantic partners financial group again grew through the acquisition of NY Partners of Long Island. Creating a master general agency with over 100 advisors serving the NY metro/ Long Island areas. As a general agent and managing partner since 1999, James focused on three critical areas consistently. Quality client services, advancing advisor support systems, and overall growth of the firm.

In June 2015, after nearly 32 years of service to clients and advisors, James retired as the Managing Partner of Atlantic Partner Financial Group. In July 2015, along with three other partners/advisors, James created an independent Advisory firm called Atlantic Advisors LLC. As CEO and partner, the focus of this advisor group is providing quality financial products and services to individuals and small business owners throughout metro NY area and beyond.

James is married with two sons and two grandsons. He enjoys reading, golf, sailing, cooking, traveling, self-improvement and discovery in all aspects of life. He is also a long standing volunteer for “Friends of Karen” of Long Island. James holds licenses in many states which include Life, Health, series 6, 66, 7, 24, 51.

- Wealth Management
- Insurance Protection
- Financial Planning
- Estate Planning Strategy
- Retirement Planning
- Business Planning
- Business Succession Strategies

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to a Secure
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