



James Lumberg | Founder, SouthCol Advisors, LLC

ENTREPRENEUR • IMPACT INVESTOR • PHILANTHROPIST • EXPLORER

BIOGRAPHY

James founded SouthCol Advisors to design and implement investment programs that help empower stewardship.

James is co-founder Emeritus of Envestnet, Inc., serving as Executive Vice President for the first 20 years of the firm's growth and innovation. During his tenure, Envestnet grew from a start-up to a NYSE publicly-traded company with more than \$4 trillion in assets under management upon his retirement in 2020. Two additional highlights of his tenure include building and leading one of the Industry's largest impact investing programs and developing Envestnet's services for mission-based foundations and endowments.

James earned his undergraduate degree in Business Administration from Southern Methodist University and a Master of Liberal Arts from Harvard University. He is an experienced portfolio manager, entrepreneur, and mission-based investor.



James is also a founder of the Kilimanjaro English School in Moshi, Tanzania which provides an education and day-to-day care to more than 150 students. In addition, James serves in leadership positions as a trustee for educational organizations including Garrett Seminary and North Shore Country Day School in Chicago.

James is near completion of the 'Explorer's Grand Slam,' a challenge to climb the tallest mountain on each of the Earth's seven continents and to ski to both the North and South Poles. He is also pursuing completion of the "High Points Challenge" by reaching the highest point in all 50 states.

James and his wife of 30 years reside in Naples and Chicago and they have two daughters.

AVAILABILITY

James is available to speak at philanthropic events, board meetings, industry conferences, and client gatherings. He is headquartered in Florida.

CONTACT

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Success on the world's highest mountains demands unwavering focus on mission and purpose, disciplined adherence to proven systems, and effective teamwork. The same is true for successful stewardship.

Drawing from his experiences climbing the world's tallest mountains in some of the most remote places on Earth, James utilizes storytelling to educate, entertain and enlighten. He has a unique style of writing and speaking on topics ranging from fiduciary governance to impact investing.

James leverages life and death lessons he learned on Mt. Everest – mental discipline, leadership, stewardship – to illustrate how to achieve shared mission.

His presentation can be tailored for a variety of audiences, from board workshops to large conference settings.

James has been featured in:

