Harris myCFO®

James R. Cody
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Jim Cody is responsible for delivering comprehensive family office solutions to individuals and families of substantial wealth. He specializes in estate and trust planning and counsels clients on sophisticated tax saving, wealth preservation and wealth transfer strategies. He has more than 24 years of professional experience. Mr. Cody led the Estate and Trust practice group for a San Francisco area law firm, where he practiced law for over 17 years.

Mr. Cody earned a bachelor's degree in economics from Yale University, received his MBA from the Graduate School of Business at the University of California, Berkeley and holds a juris doctor from the University of California Hastings College of the Law. He is a member of the State Bar of California and is certified as a specialist in Estate Planning, Trust and Probate Law by the California Board of Legal Specialization of the State Bar of California. Mr. Cody is also a Fellow of the American College of Trust and Estate Counsel (ACTEC).

Mr. Cody makes his home in Burlingame, California. He serves on the Board of Trustees of Mills-Peninsula Hospital Foundation and is the chairman of its Planned Giving Committee and a member of its Finance Committee. Mr. Cody has published articles and been a contributing author to professional treatises on estate planning subjects. He is a frequent speaker on estate and tax planning topics, including teaching continuing professional education for the University of Southern California Law School Institute of Federal Taxation, California Continuing Education of the Bar, the California Society of CPAs and other professional organizations.

HARRIS myCFO®

Harris myCFO is dedicated to simplifying the complex issues that face individuals and families of wealth by delivering the guidance and services of a Comprehensive Family Office.

We give you the flexibility to build a team of specialists, coordinated by Harris myCFO, that can include your own trusted advisors along with some of the best professional talent for the various aspects of your wealth management strategy.

Harris myCFO is the next step for affluent individuals and families who desire a comprehensive wealth management solution. One that is built upon objectivity, accountability and best-in-class solutions provided on a fee-only basis. It is also designed for existing family offices who may want access to outside talent and resources to expand their capabilities.

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