

## Helping you reach your financial goals

### Value Proposition

As a Senior Financial Advisor, Joe is dedicated to helping clients achieve their financial goals. Whether you are business owner looking to retire and transition ownership while preserving hard earned wealth, or you are an individual or family saving for retirement while looking to leave a legacy and create opportunity for your heirs, Joe can assist by helping you to achieve all of these financial goals.

### Experience

Joe has over 15 years of experience in the financial services industry and joined Wells Fargo Advisors in March of 2019. Previously, Joe worked as an Associate Vice President at Stifel and Barclays Wealth & Investment Management in the Americas, as well as a Financial Advisor and ESOP Reinvestment Specialist at Morgan Stanley Smith Barney.

### Specialty

Joe has spent his career in the financial services industry focusing primarily on ESOP transactions, specifically assisting Selling Shareholders with the execution and implementation of a Section 1042 Election, QRP Portfolio construction, and monetization loan strategy.

### Education

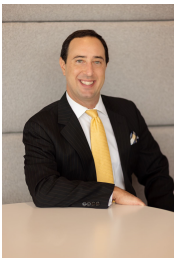
Joe graduated from Hampden-Sydney College with a Bachelor of Arts Degree in Economics and Commerce, and from the University of Virginia with a Certificate of Finance, Accounting, Marketing, Management, and IS/IT.

### Personal

Joe resides in Falls Church, Virginia with his wife Liza and their two boys, Peter and Andrew. In his free time, Joe enjoys volunteering as a youth sports Coach, Scouting Leader, as well as playing soccer, golf, hiking, camping, and snowsports.

### Contact Joe

Whether you are a business owner considering a potential ESOP transaction and 1042 election, or you are a traditional investor looking for a comprehensive retirement plan review - please reach out to Joe directly per the contact info below. Joe and his team at The Private Bank offer an array of services to assist with all aspects of a high-net-worth investor profile.



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