

Putting The **PIECES** Together



Joseph Giangiulio, CPA/PFS, CFP

Will my retirement be financially secure? Are my assets working as hard as I am? What financial opportunities and pitfalls should I be aware of?

These are only some of the pieces of an ever changing puzzle that are determining your financial future – whether you know it or not.

Helping people put together the pieces of their financial puzzle is the specialty of Joseph Giangiulio. By listening, caring and asking the right questions, he enables people to think about their financial future and builds a life-long relationship with them.

“A proficient planner is like a general practitioner of finance,” Joe said. “I treat the client’s complete fiscal fitness to work toward total financial health and well-being. And just like the doctor-patient relationship, success is based on technical skill and trust.”

Early in his career as a Certified Public Accountant, Joe found he was being pulled in the direction of personal financial planning. Existing clients wanted more. They wanted to know how to invest for

retirement and college, how to reduce taxes and what other steps they should take to plan for their financial future.

“Even the most astute investor doesn’t know where all the pitfalls lie.”

To meet the varied needs of his clientele, he went on to earn his designation as a Certified Financial Planner (CFP). With more than 22 years of experience, he has assumed a diverse range of clients with everything from the simplest to the most complex situations. His financial planning skills and knowledge have also been sought out by *USA Today*, *US News & World Report* and *Money* magazine.

Whatever the situation, when people come to Joe they receive the benefits of a full-service organization.

He will develop a personalized financial plan, implement the program and monitor its progress.

For each prospective new client, he provides a complimentary one-hour consultation. With some specific information about the client’s situation and financial goals, the first meeting will often be the foundation from which a solid financial future can be built.

Services provided by Joe include asset management, pre-retirement & retirement planning, college needs analysis, estate planning and insurance consultations. Joe is also a Registered Representative with FSC Securities Corporation, a full-service Broker/Dealer, member SIPC, and can help clients implement plans with a full range of financial products and services. He also uses his knowledge and experience to establish corporate benefit plans, such as cafeteria plans, 401(K) plans and other fringe benefits.

Joe feels an educated client is also important; therefore, he teaches seminars which are public or sponsored by corporations as fringe benefits.

“When it comes to planning their financial future,” Joe said, “even the most astute investor doesn’t know where all the pitfalls lie.”

With busy schedules and constant change, clients want a professional who specializes in keeping track of changing rates, tax regulations and new investment opportunities. According to Joe, if anyone looks at their finances the same way they did as recently as three years ago, they are being short-changed.

Joe Giangiulio can give clients the help they need to turn the puzzle into a meaningful plan. He can possibly even find a few pieces which might have been lost.

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