As a former Marine, Joe is on a mission to help you regain and maintain your financial well-being.  What drew Joe to Redwood Financial Strategies was the limited number of clients they work with.  This method allows Joe to dedicate time to learn and truly understand each one of his client’s financial needs and then tailor an individualized plan to support his client’s goals.

Being mission driven is easy for Joe, since before starting his financial advising career in January 2021, he spent four years in the Marines, where he attained the rank of Sergeant.  During his time in the Marines, Joe deployed to Afghanistan in support of Operation Enduring Freedom and Iraq in support of Operation Iraqi Freedom. After the Marine Corps, he earned his bachelor’s degree in engineering at the University of Wisconsin – Milwaukee.

Joe’s military experience taught him the value of true friendship and trust. Knowing that his brothers and sisters always had his back; that they would pick him up when he stumbled and fell and would carry him if he couldn’t continue was a powerful feeling.   This trust and camaraderie gave him the strength and will to surmount all obstacles, endure any hardships and accomplish every mission.  With that feeling of trust in mind, Joe will support and guide you through your financial journey as your dedicated “Financial Concierge.”

When not in the office, Joe enjoys spending time with family, coaching youth baseball, football, and wrestling. He and his wife, Cassie have three children: Joey, 11, John, 9, Jillian, 6.  Joe also has a service dog, PERRY. Joe met PERRY through paws4vets in November of 2020 and became an official client/dog team when they graduated the program in November of 2021.