Joe began his career as an investment advisor in 2014 and quickly began building meaningful relationships with his clients. Joe’s deepest desire is to help families create successful plans for their retirement through coaching, guidance and implementation. Joe co-founded Twin City Private Wealth with a desire to take retirement planning to a more customized and meaningful level. If you work with Joe, you are a friend!

Joe holds the **RICP**(copyright symbol) designation from the American College of Financial Planning. Joe also holds a Series 65, Series 3 and Property/Casualty Insurance License.

Joe and his wife, Stacey, have been married for over 25 years and have a son, Charlie and daughter, Lauren and a dog named Georgie. They are members of Union Grove Baptist Church in Lexington and enjoy teaching 7th and 8th grade teens in Bible fellowship classes every week. Joe is a native of Florida but considers North Carolina home. When not working, Joe loves to spend quality time with family, enjoying the outdoors and traveling to the mountains or the beach.