



Joe Fenlon

Financial Services Representative
Principal Securities Registered Representative
Financial Advisor



Ready to focus on your financial goals? I can help.

Your goals — my focus. Let's put strategies to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.

Let's connect to get started:

(414) 258-6220 Ext. 139
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Joe is a Financial Advisor who for over 10 years has helped individuals and business owners set and achieve their financial goals. Joe specializes in estate and retirement planning, executive benefits and plans for growing businesses.

Joe's focus includes:

- Create compensation plans for key executives and business owners
- Coordination of existing compensation plans with an overall estate planning strategy
- Working with client's tax and legal advisors on reduction of estate tax liability
- Comprehensive financial planning
- Evaluating retirement savings and estate distribution strategies.
- Work with client's advisors to ensure proper planning

Joe is a member of the National Association of Insurance and Financial Advisors, and a qualifying member of the Million Dollar Round Table.

Joe currently resides in Franklin, WI with his wife, Megan, and their two daughters, Madeline and Isabella. When he is away from the office, Joe enjoys supporting Marquette University basketball and Packer football, travelling, and fishing.

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