

Joseph Manzo

Financial Services Representative
Principal Securities Registered Representative
Financial Advisor

Your unique goals – my top priority.

I'm committed to helping you achieve success.



Let's connect to get started:

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Visit my LinkedIn Page! [Joseph Manzo](#)

EXPERIENCE

Joe is a business professional who has owned, ran, and managed companies most of his adult life. With nearly 10 years in the financial services industry and a clear understanding of business owner needs and desires, Joe is keenly placed to be a resource to business owners.

EDUCATION & CREDENTIALS

- Cal State University Fullerton
- FINRA Series 7, 63 & 65 Securities Registration
- Million Dollar Club – 2012-2016
- Million Dollar Round Table

JOE SPECIALIZES IN

- Personal and Business Financial Planning
- Retirement Income Planning
- Retirement Distribution
- Business Protection
- Survivor Income
- Wealth Transfer
- Income Protection
- Exit Planning

INTERESTS

Joe is a lifelong California resident and currently resides in Roseville. He is active in his church and community. Joe loves spending his free time making memories with his three children.

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