



**Joe Rhodes CFP, CLU, ChFC**

Lion Street Private Client Group  
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**Background & Experience**

Joe Rhodes work with high net worth families and affluent individuals by taking a comprehensive, consultative approach to risk management. With each client he reviews and analyzes a variety of factors including personal values, family situation, financial goal, income needs, and desired asset inheritance to develop a customized plan.

Joe comes from Wells Fargo where he was a Wealth Insurance Specialist. Prior to joining Wells Fargo, he had worked as a Brokerage General Agent planning for both banking and investment house clients. Joe has 20 years of experience working with high net worth individuals, institutional, and non-profit clients planning executive compensation, estate and succession planning.

**Certifications & Education**

- Certified Financial Planner, CFP®
- Chartered Life Underwriter, CLU®
- Chartered Financial Consultant, ChFC®
- University of California - Davis, CA  
Bachelor of Science, Managerial Economics