PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Joe Rhodes, CFP®, CLU®, ChFC®

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Joe Rhodes works 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 goals, income needs, and desired asset inheritance to develop a customized plan.

Joe comes from Wells Fargo where he was a Wealth Insurance Specialist working with Wells Fargo Advisors. Prior to joining Wells Fargo, he has 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 for executive compensation, estate and succession planning.

EDUCATION

- University of California- Oakland, CA