

### Joseph E. Camargo professional Bio

Joseph E. Camargo,  
CMT\*  
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**Mr. Camargo, a graduate of the College for Financial Planning, is an expert in proper Asset Allocation & Wealth Management.**

Over the years, he has taught throughout the state, frequently speaking to a number of issues, most notably :

- **U.S. Job market.**
- **U.S. stock & bond markets**
- **Proper investing**
- **The Global Economy**
- **Retirement**

He has been featured on the following news organizations :

**As seen on :**



#### About The Firm:

The firm, formerly a **Registered Investment Advisory firm**, is fully accredited by the **Better Business Bureau**, presently holding an **A+ rating**.

#### About The Author:

The author, Joseph E. Camargo, with over 28 years in the Financial Services industry, is the founder & Portfolio Manager of Phoenix Financial.

Having spent a combined 22 years (28 total) in such notable organizations as **Fidelity Investments**, **State Street Global Markets** (a division of State Street Corp.), and **Wells Fargo Advisors**, Mr. Camargo brings with him an extensive and comprehensive industry background & skill-set.

Given his personal belief that the industry, unfortunately, has largely adopted a sales and product-driven nature, he doesn't believe in "pushing products."

Instead, he believes very strongly:

- in leveraging macro-economic and market conditions.
- in guarding against downside and overall market risk.
- in the laws of Supply and Demand & in Valuation.
- in monitoring Geo-political conditions & in the Economic Cycle.
- in understanding overall Business & Consumer sentiment.

Joe attended the University of Massachusetts, majoring in Political Science. He's also a graduate of the **College for Financial Planning**®, the nations oldest provider of financial planning education.

He is a recipient of the following designations, both conferred upon by the **College For Financial Planning**:

- AAMS® designation (**Accredited Asset Management Specialist**).\*\*
- AWMA® designation (**Accredited Wealth Management Advisor**).\*\*

\*\*Currently inactive pending completion of Continuing Education credits.

\*Joe is also a CMT (**Chartered Market Technician**) candidate.

Mr. Camargo has also held five **FINRA NASAA licenses**, to include **Series 24, 7, 65, 63**.

He presently lives in the South Shore area with his wife and two youngest children.

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