



Joe Scalise, CFP[®], CIM[®]

Senior Portfolio Manager & Senior Investment Advisor

With more than 25 years in the investment industry, Joe has built his career on helping clients make confident, informed financial decisions. As a Portfolio Manager and Investment Advisor, he has worked closely with clients to design portfolios that balance growth, income, and risk always tailored to individual goals and life circumstances.

Joe believes successful investing is as much about discipline and perspective as it is about markets. By focusing on long-term planning, thoughtful diversification, and clear communication, he helps clients stay grounded through both market uncertainty and opportunity. Clients value Joe for his experience, steady approach, and genuine commitment to their financial well-being. Married and family-oriented, Joe values the same principles in his personal life that guide his professional work: long-term thinking, balance, and stewardship.

Outside of work, he enjoys spending time with his family and travelling, experiences that reinforce his perspective on planning for the future and protecting what matters most.