



Joe Roberts CLU®, ChFC®

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Background & Experience

Joe Roberts, CLU, ChFC has been in the financial services business for twenty five years providing permanent and term, long -term care, and disability income insurance solutions. Joe assists Financial Advisers and their clients in shielding their wealth from depletion via taxation and risk events that one may face as they age. Prior to being in the insurance industry Joe spent seven years with Merrill Lynch as a Financial Adviser.

Joe has over 35 years of experience in both the brokerage community and the life insurance industry. Joe holds a Chartered Life Underwriting and a Chartered Financial Consultant designation from The American College as well as several securities and insurance licenses. He is also an active member in the Greenville Estate Planning Council and the Blue Ridge Chapter of the Society for Financial Professionals.

Joe lives in Greer, South Carolina with his wife Shanon and their two boys, Benjamin and Nathan. Joe served in the US Air force prior to attending the University of Connecticut.

Joe has his Life and health and variable licenses in NC and SC. He also holds the FINRA Series 7, 65, and 24.