

## **Joseph R. Russo**

Joe Russo is a native of Cedar Rapids, Iowa where he attended LaSalle High School and Kirkwood College. He began his securities career in 1972 as a Registered Representative with United Financial Services Corporation, earning “Broker of the Year” and “Manager of the Year” awards. He joined Merrill Lynch in 1977 and was promoted to Branch Manager and Corporate Officer that same year.

In 1983, Mr. Russo founded Perpetual Investment Associates and Perpetual Investment Advisors, the first Broker/Dealer and Registered Investment Advisor to be partnered with a state-chartered Savings and Loan in the nation. He served as CEO and Board Chairman until 1989 when AEGON, USA Securities, Inc. acquired the companies.

In 1992, Mr. Russo created an independent securities marketing firm to service the needs of AEGON’s rapid expansion. That firm is known today as Advantage Financial Group. AFG is the premier OSJ within National Planning Corporation. It manages over \$1.5 billion of client assets within its 28 Branch office infrastructure.

In addition to his duties as CEO & Chairman of AFG, he maintains his Registered Investment Advisor practice in Cedar Rapids, and conducts his securities brokerage business from Naples, Florida. Mr. Russo serves on the President’s Advisory Council of National Planning Corporation, and is licensed as a General Securities Principal, Municipal Bond Principal, Options Principal, and Registered Investment Advisor Representative. He is a frequent guest speaker at securities related venues and serves on numerous corporate and charitable boards.