The Retirement Green Zone

Learn More

Empowered By A.T.T.A.C.

My unique process.

A = AWARENESS and Philosophy on how money truly works

T = TARGETING your Financial Dreams & Goals and Gathering your Financial Data

T = TESTING Efficiencies' and Inefficiencies' on your economic model (in your financial world

A = ACCOUNTING of Math, Science, and Verification and Implementation of Strategies

C = COACHING on a periodic basis to make sure we are on track for your dreams and goals.

Learn More About Us

The purpose of my life is to be the best Financial Coach, Advocate, Leader, Future Husband, and Father I can be. To enjoy a life of Happiness, Health & Vitality, Everlasting Relationships, Gratitude, and Financial Abundance. I do this by sharing my Specialized Knowledge, Unique Skills, and Generosity with my Friends, Family, Clients, and touching the lives of others I come across.

Learn More

About Me

Vice President of Investments and Financial Planner.

My worthy ideal: To discipline and galvanize individuals, families, and small business owners to earn maximum efficiency on every dollar they have so they have the financial freedom to do what they want and live their lives to their fullest potential! *My mission statement:* I specialize in using a diversified portfolio of financial vehicles aimed at designing a customized portfolio for my clients. My goal is to teach you that it is not the rate of return that matters, but the way you position underperforming dollars into areas that will allow your money to benefit from multiple philosophies. Together, we will look to perfect the three main areas of your plan, which are Protection, Savings, and Growth Elements. I take a non-traditional approach to securing your financial wealth. As a Vice President of Investments and Financial Planner of Garden State Securities, I am dedicated to helping individuals, families, and businesses build, protect, and conserve their financial futures. To keep up to date and develop my professional skills over my 15 year career, I have regularly attended industry training and certification programs. This resulted in me becoming licensed in the following areas:

- **CFS Certified Funds Specialist**
- **FINRA SERIES 7 LICENSE**
- **FINRA SERIES 66 LICENSE**
- **Life Insurance License**
- **Health Insurance License**

My academic achievements include:

- **A Bachelor of Arts in Economics, Business, and Finance from Lafayette College**
- **A minor in Art History**

- **In August 2007, I earned a Certification as a Retirement Planning Specialist from The Wharton School, University of Pennsylvania.**

Maintaining a strong sense of community and solid professional foundation are very important to me. My community activities and professional affiliations include:

- **Member of the National Association of Insurance and Financial Advisors**
- **Member of the Million Dollar Round Table**
- **Member of Autism Speaks**
- **Lafayette College Alumni Association**
- **Judge of Miss Monmouth County 2015**
- **Member of the Thomas Peterpaul Foundation Corporate Sponsor-research to prevent childhood cancers**

my Linked in profile

Contact Me

Name

Email Address

Phone Number

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13 + 3 =

Submit

INVESTMENT ADVISORY

We use fact-based investment decisions to achieve your financial goals.

RETIREMENT PLANNING

By maximizing opportunity and mitigating risk, will ensure financial success.

INSURANCE PLANNING

Enjoy amazing benefits while you're still living plus still ensuring your legacy.

ESTATE PLANNING

The idea is to live, spend, and enjoy your wealth today, and still protect your legacy.

CASH FLOW MANAGEMENT

Increased cash flow with reduced costs, fees, penalties, without unnecessary products.

DISTRIBUTION PLANNING

Don’t settle for living off interest alone when you can spend principal and interest without worry.

RISK MANAGEMENT

Mitigate all factors that threaten your control and liquidity. (stock market / inflation / taxes / longevity / lost opportunity cost)

ASSET PROTECTION

Plugging the gaps and eliminating hidden costs that are silently eroding your hard earned wealth.

PORTFOLIO DESIGN

Balanced, stress-tested and intelligently designed to deliver performance in all markets.

Securities offered through Garden States Securities, Inc. member FINRA/SIPC. Advisory services offered through Garden State Investment Advisory Services, LLC, an SEC registered investment adviser. Insurance products and services are offered through Garden State Insurance Agency, Inc. Joseph Petrillo does not offer tax advice or tax planning, and any decisions made in regards to this area should first be discussed with your tax preparer or accountant.

Check the background of this investment professional on FINRA's BrokerCheck.

Click Here for Important Disclosures.

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GET STARTED

We Manage Investments of All Sizes

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APPROACH

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HOW TO INVEST

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HOW IT WORKS

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OUR SERVICES

Investment Plans

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PLAN

Retirement Plans

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GROW

Impact Investing

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MANAGE

Estate Planning

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MANAGE

Portfolio Management

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PARTNERSHIP

Risk Management

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GROWTH

Mergers & Acquisitions

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CONTACT

Get In Touch

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Name

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SUBMIT

Divi Investment Firm.

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Pages

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Joseph Petrillo Protection Group

The purpose of my life is to be the best Financial Coach, Advocate, Leader, Future Husband, and Father I can be. To enjoy a life of Happiness, Health & Vitality, Everlasting Relationships, Gratitude, and Financial Abundance. I do this by sharing my Specialized Knowledge, Unique Skills, and Generosity with my Friends, Family, Clients, and touching the lives of others I come across.