

Meet your financial advisor

Joseph Mauriello

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“As a holistic financial planner, I coach my clients so that they can achieve confidence when it comes to planning for the future. My inquisitive and consultative approach can help clients feel confident about their financial decisions.”

LICENSES/EDUCATION

- Series 7, 63, and 65 licenses
- State of CT Life and Health Insurance License
- Bachelor of Science - University of Connecticut

ABOUT JOSEPH

- Joe has been a financial planner for 10 years
- Joe and his wife Katie live in Bristol with their sons Joey and Matthew
- Joe is actively involved in youth sports in his community coaching baseball, basketball and soccer, and currently serves on the Board of Directors of McCabe Waters Little League in Bristol



INVESTMENT SERVICES

RAYMOND JAMES®

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EFFECTIVE: JANUARY 1, 2018

What a financial advisor does...

With a financial advisor in your corner, you have a trusted financial professional who can provide a sound advisory process and a long-term perspective to help you stay focused on your core objectives.

Here are some of the key facets:

UNDERSTAND YOUR CONCERNS

This means getting to know you and your family by gathering information about your current circumstances, future goals, aspirations and concerns.

IDENTIFY YOUR FINANCIAL GOALS

Your plan may be as straightforward as saving for retirement or a child's education. But you may need a more complex solution, like selling your business and using the proceeds to develop a sustainable plan for retirement income and establish a charitable trust.

ASSESS YOUR TOLERANCE FOR RISK

Your advisor will factor in your investment horizon and assess the types and levels of risk you can afford and with which you're comfortable.

COLLABORATE WITH YOUR TEAM

When appropriate, your advisor can also work with your CPA, attorney and other professionals to help ensure all aspects of your financial and estate planning are addressed.

DESIGN AND IMPLEMENT AN APPROPRIATE INVESTMENT STRATEGY

Your financial plan should not be an off-the-rack solution. Your advisor has access to in-depth evaluations of hundreds of potential investments and should offer objective, unbiased recommendations based on what's best for you.

MANAGE, MONITOR AND ADJUST YOUR PLAN AS NEEDED

Financial planning is an ongoing process that requires periodic review. If it becomes necessary to adjust components of your plan in light of changing circumstances and evolving objectives, you'll make decisions and adjustments together.

STAY FOCUSED ON LONG-TERM PLANNING

Your advisor can help keep you apprised of relevant market developments and help you understand their implications. This helps ensure your financial decisions are based on facts and careful research, rather than emotions and market volatility.