



**APOLLO**  
FINANCIAL ADVISORS



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## **Our Mission**

*We believe that time is the only true resource.*

*Turning your hard-earned life savings into the lifestyle of your dreams represents the significance of your success and the apex of our service and advice.*

*From the start of your career, to the planning of your legacy and each step in between, we strive to achieve a seamless transition through each phase of life.*

*Relying on our combined 30 years of experience helping clients, we seek to understand and define the lifestyle choices that are important to you while identifying appropriate solutions to meet your needs.*

*We view our relationships as true collaborations based on honesty, shared values and a joint search for ideas. As our relationship develops, your goals will change over time. Our mutual success will be defined by effectively deploying your financial resources and efficiently simplifying your decisions.*

*We do all of this in the spirit of family values, lifestyle, enjoyment and good fellowship. Above all else we value most the relationships that we build, the trust that we earn, and the people we are blessed to call our clients and friends.*

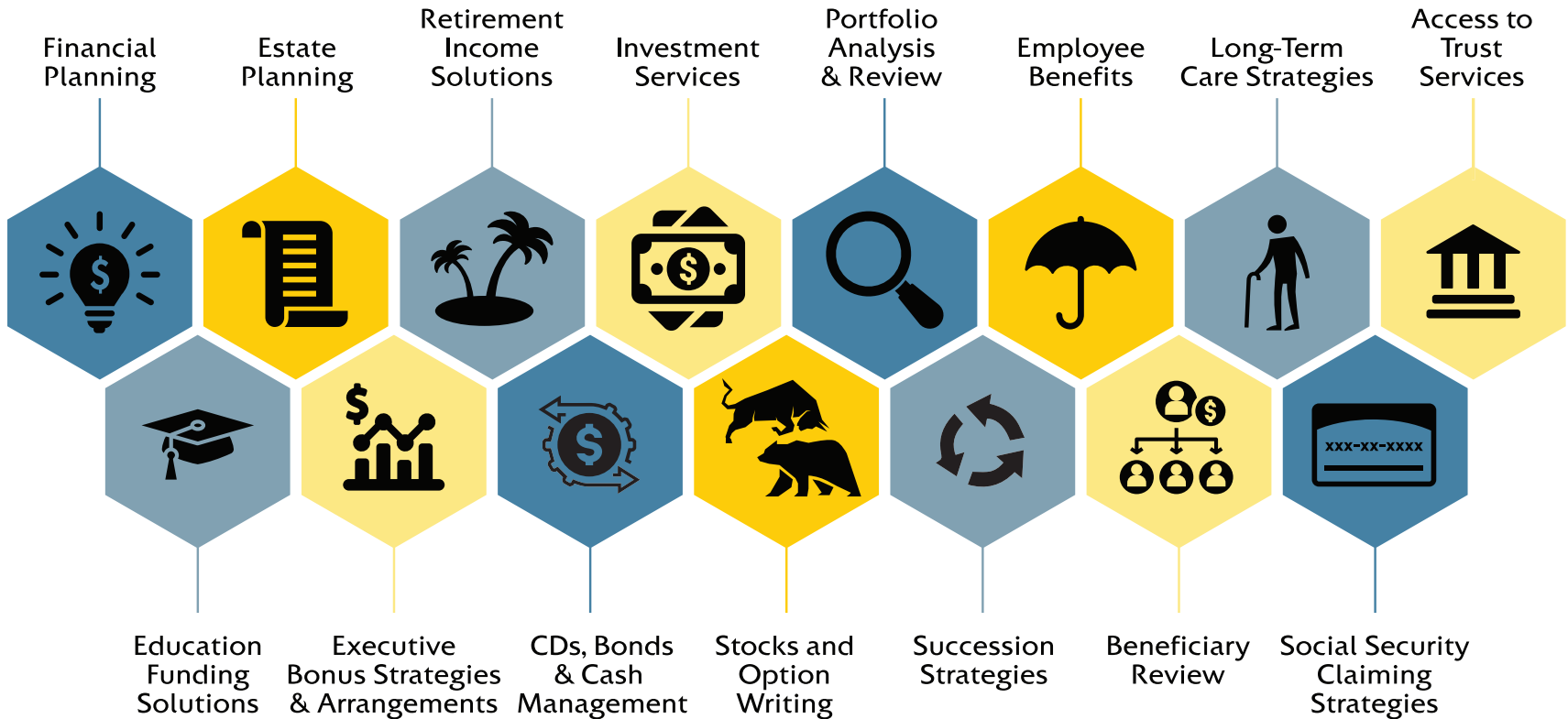
*When our clients reward us with trust and confidence, we return their good favor with dedicated service and attentiveness. This is our mission and our promise to you.*

**Your Goals. Our Advice. Shaping Your Future One Good Decision At A Time.**



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# Our Services





## **YOUR FINANCIAL TEAM AT WORK**

**When life happens,  
we are always by your side.**

**We help design, coordinate and  
implement your overall financial strategy.**

**We can be the primary point of contact  
for you & your family in all financial matters.**

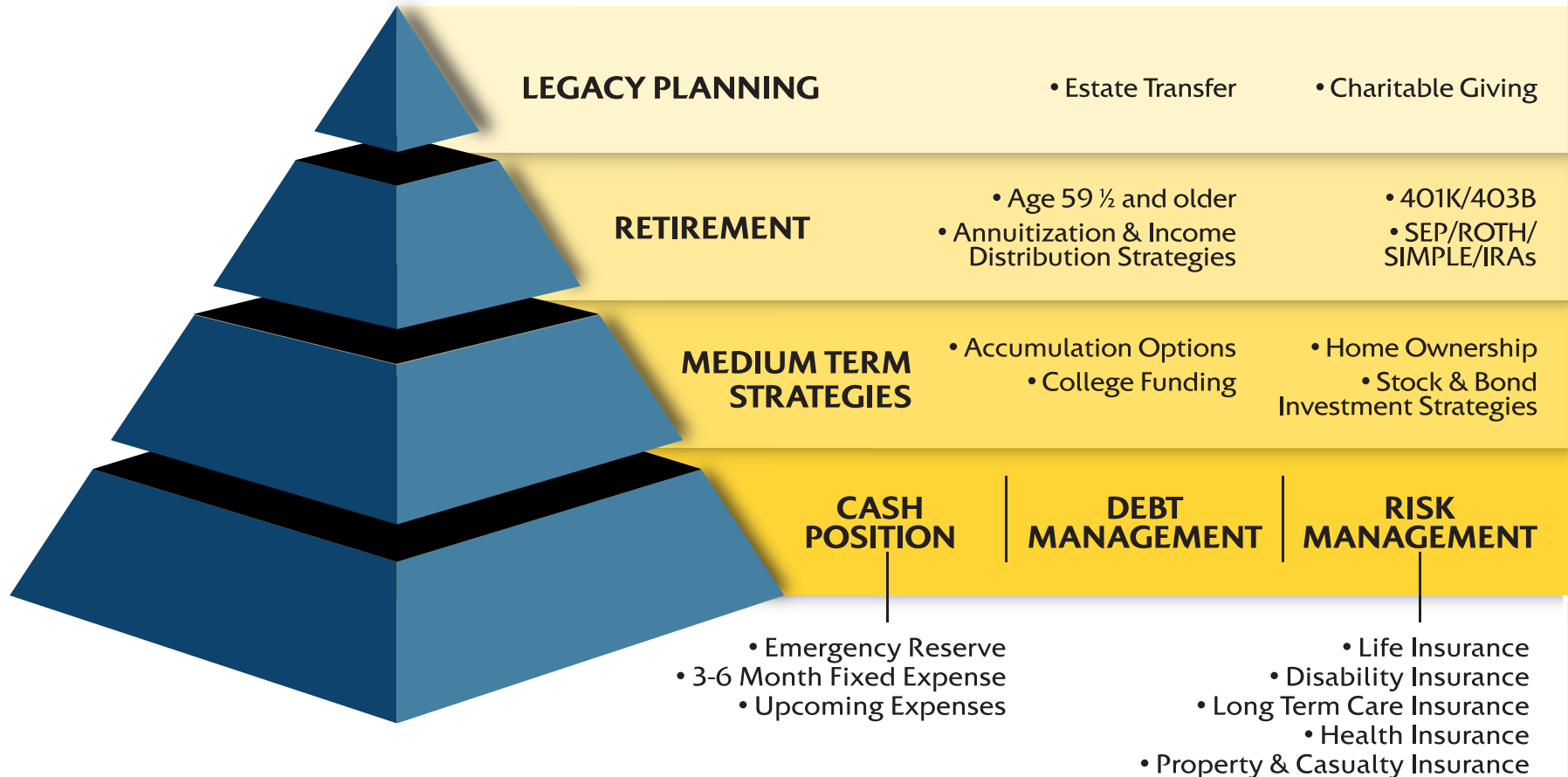
**We may coordinate & manage your professional  
relationships including CPA, attorney & benefits.**

**Our goals-based wealth management  
process ties all of this together in order to simplify your life.**



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# Strategic Planning





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# Client Service





# Our Commitment



## FINANCIAL PLANNING ADVICE & SERVICES <sup>1</sup>

Discovery  
Analysis  
Recommendations

Individually Priced



## INVESTMENT ADVISORY SERVICES

Tolerance & Volatility Assessment  
Investment Advisory  
Program Selection  
Portfolio Design & Construction  
Monitoring, Rebalancing  
Periodic Review

Advisory Fee - percentage fee  
based on assets under management <sup>2</sup>



## INSURANCE AND SECURITIES IMPLEMENTATION

Needs Analysis  
Solution Development  
Company & Product Selection  
Service

Commissions<sup>3</sup>

1. Separate from the financial plan and our role as financial planner, we may recommend the purchase of specific investment or insurance products or accounts. These product recommendations are not part of the financial plan and you are under no obligation to follow them.

2. Separate from the financial plan and our role as financial planner, we may recommend the purchase of specific investment or insurance products or accounts. These product recommendations are not part of the financial plan and you are under no obligation to follow them.

3. Commission costs are outlined by prospectus and product proposal.

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The financial professionals associated with LPL Financial may discuss and/or transact business only with residents of the states in which they are properly registered or licensed. No offers may be made or accepted from any resident of any other state.



Joe Franciscone has been assisting clients with their financial needs for almost three decades.

Prior to joining LPL Financial, and starting Apollo Financial Advisors, Joe worked for Morgan Stanley, Credit Suisse, Merrill Lynch, and Wells Fargo for several years. His extensive experience in the business, through good markets and bad, makes Joe a great resource for navigating financial challenges and life events, delivering common sense advice one good decision at a time.

Joe assists High Net Worth Families & Business Owners manage their Wealth in a variety of ways including fee based financial planning, retirement & estate planning, investments, life insurance, and annuities. This diversity in product and practice allows Joe to work well with Attorney's, CPA's Doctors, Entrepreneurs, and Executives of all levels.

Residing in Fairfield, NJ, Joe is a graduate of Montclair State University where he earned a BS in Finance. His securities registrations include the 7, 9, 10, & 66 (held with LPL) as well as Insurance licenses including Life, Health, and Variable Insurance.

Joe is an avid reader and follower of Warren Buffett, Stephen Covey, Milton Friedman, Benjamin Graham, Peter Lynch, Charlie Munger, Jim Rohn & Dr. Jeremy Siegel. He is a longtime protégé of Drumming's Global Ambassador Dom Famularo. Joe is a Member of the Park Avenue Club and a Supporter of the Park Avenue Foundation in Florham Park, New Jersey. In his free time, Joe enjoys music, drumming, learning, sports, fine dining, and his dog.

*Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. The LPL Financial registered representative(s) associated with this website may discuss and/or transact business only with residents of the states in which they are properly registered or licensed. No offers may be made or accepted from any resident of any other state.*



**Joe  
Franciscone**

**President**

**Apollo Financial Advisors**

**Education:**

B.S. Finance–Business  
Montclair State University

**Registrations and Licenses:**

Series 7, 9, 10, & 66 securities



LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader\* in the markets we serve, supporting more than 18,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients. For more information about LPL Financial, visit [www.lpl.com](http://www.lpl.com).

*\*Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine June 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report)*