

Joe Wilson, CFP®



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Financial Advisor
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As a financial professional with the Northwest Business Center of the Principal Financial Group®, Joe Wilson works with individuals primarily on retirement planning and investment/insurance strategies to help achieve their financial goals. He also works with businesses to help them establish & manage qualified retirement programs to help employees save for retirement. Joe has more than 15 years of experience in the financial services industry.

Joe earned his BBA in Finance from the University of Iowa and joined The Principal in 2001. Joe holds his CERTIFIED FINANCIAL PLANNER certification, Chartered Financial Consultant designation, and his NASD series 4, 7, 24, 63 and 65 securities licenses.

Joe is involved in several associations including Lake Oswego Chamber of Commerce, the Portland Business Alliance and the Financial Planning Association.

In Joe's spare time he enjoys spending time with this family, golfing, hiking and exploring the northwest. He resides in NW Portland, Oregon.



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