



CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

Joseph Maugeri, CFP®
Managing Director, Marketing and Corporate Relations



Joseph V. Maugeri, CFP® joined CFP Board in 2011 and is the organization's Managing Director for Marketing and Corporate Relations.

In this role, Mr. Maugeri is responsible for the growth of CFP® professionals among all channels, marketing initiatives, firm relations, product development and is a member of the Executive Leadership Team. Overseeing the Market and Corporate Relations department, Joe's primary responsibility is to increase the demand for CFP® professionals and CFP® professional education and experience among all financial service firms.

Before joining CFP Board, Mr. Maugeri was a Vice President and head of the Professional Alliance program at Merrill Lynch; a Director at SEI Investments, Inc., leading its marketing and distribution support services; and worked for more than 14 years as a financial advisor at AXA Advisors, LLC. He received his Bachelor of Arts from Temple University, an M.S. in Leadership Studies from Northeastern University and has completed a Competitive Marketing Strategy Executive Education program at the Wharton School of Business.

ABOUT CFP BOARD

The mission of Certified Financial Planner Board of Standards, Inc. is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for competent and ethical personal financial planning. The Board of Directors, in furthering CFP Board's mission, acts on behalf of the public, CFP® certificants and other stakeholders. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. CFP Board currently authorizes more than 72,000 individuals to use these marks in the U.S.