

JOE SULLIVAN, CFP[®], ChFC[®], CLU[®]

DIRECTOR, ADVANCED MARKETS



Joe has experience in a number of financial planning subject matters.

Joe Sullivan joined the Transamerica Advanced Markets Group in 2019 after nearly nine years at Raymond James Financial where he worked as a Relationship Manager with mutual fund and annuity partners. Prior to entering the field of financial services, Joe spent over 15 years in the land development industry.

Joe is a Certified Financial Planner[™] (CFP[®]), Chartered Financial Consultant[®] (ChFC[®]), Chartered Life Underwriter[®] (CLU[®]), and currently holds the FINRA Series 7 registration. He has a passion for ensuring clients can maximize the financial opportunities available to them and does that by educating financial services professionals on advanced planning strategies.

Joe lives in St. Petersburg with his wife and two children. When he is not working, he enjoys challenging himself in varying pursuits such as woodworking and running.

ABOUT JOE:

- 11 years of financial services experience
- Joined Transamerica in 2019
- Certified Financial Planner[™] (CFP[®])
- Charter Financial Consultant[®] (ChFC[®])
- Chartered Life Underwriter[®] (CLU[®])
- Bachelor of Science in Business Administration, The University of Florida

CONTACT JOE:



800-851-7555



joseph.sullivan@transamerica.com



transamericaadvancedmarkets.com

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP[®], Certified Financial Planner[™], and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Securities offered by Transamerica Capital, Inc. (TCI), 1801 California Street, Ste 5200, Denver, CO 80202.

