

# CALPRO



**Joseph Bauers, AIF®**

Director, CALPRO Network  
Sr. Financial Advisor

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## **Experience and Licenses**

With more than 20 years of financial services experience and as the CEO and President of CALPRO Network Financial, Joe drives the strategic direction for the firm by analyzing and anticipating market trends and future opportunities. Joe is a recognized leader in San Diego for retirement and financial planning for educators, small business owners and high-net worth individuals.

Joe specializes in helping individuals at every stage of life plan and invest for their future. His primary goal is to keep the client's success at the center of the planning process. This process aligns with his fiduciary responsibility and acting in the client's Best Interest. He focuses on financial education to create a financial roadmap and to develop a financial discipline for all clients.

Joe holds FINRA Series 7, 24, 66 and Life and Health Insurance licenses. In addition, he is an Accredited Investment Fiduciary (AIF).

## **Accolades and Personal Interests**

Joe received Phi Delta Kappa's "Friend of Education Award" in 2019 and a guest presenter for VEBA Wellness Resource Program. He is an active youth sports coach in the Scripps Ranch community. Joe enjoys Over The Line, backyard corn hole games, coaching youth sports teams and spending quality time with his wife and two children.