

JOSEPH LAMBERT

FINANCIAL ADVISOR



Profile

I'm Joseph Lambert, a dedicated financial advisor with years of experience helping clients navigate their financial journeys. My goal is to provide clear, strategic guidance, whether you're planning for retirement, managing investments, or building long-term wealth. As a registered professional with FINRA, I take pride in offering personalized, client-focused financial advice that's rooted in integrity and trust. I'm committed to ensuring you feel confident and well-informed at every step, and I work closely with you to create financial solutions tailored to your unique goals and aspirations.

Experience

2011 - Present **PIMCO INVESTMENTS LLC**
External Retirement Advisor Consultant
As an External Retirement Advisor Consultant at PIMCO for over 14 years, I provided strategic retirement solutions to institutional clients and financial advisors. I collaborated closely with professionals to optimize portfolios and deliver tailored strategies, ensuring alignment with client goals and market trends. My expertise and commitment to client success positioned me as a trusted advisor in the retirement planning space.

2020 - Present **12XWEALTH STRATEGIES**
Financial Advisor
Portfolio optimization based on your risk tolerance; Strategic solutions for your post-career security; Protecting your wealth for generations.

Education

2006-2010 **Fordham University - Graduate School of Business Administration**

Achievements

Broker Regulated by FINRA

FINRA-regulated broker with over 14 years of experience, specializing in providing compliant, strategic financial advice to clients, ensuring integrity and trust in every transaction.



Competences

- ✓ **Clarity - Clear direction in complex markets**
- ✓ **Strategy - Data-driven planning for your goals**
- ✓ **Protection - Risk management for your assets**
- ✓ **Partnership - Long-term commitment to your success**

Contact

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