

# Joseph A. Auteri, MSFS, AEP

## Managing Partner- Financial Adviser

Born: Philadelphia, PA

Resides: Drexel Hill, PA

Education: The Episcopal Academy '88  
B.S. Drexel University '93  
M.S. The American College '01

Family: Diana Pezzetti (Spouse)  
Joseph A. Auteri II (Son)  
Giuliana E. Auteri (Daughter)  
Anthony M. Auteri (Son)



Mr. Joseph A. Auteri received a Bachelors of Science degree in Finance and Economics in 1993 from Drexel University. Joe participated in the Co-Operative education program while attending Drexel and worked as a Special Benefits Coordinator at CIGNA Corporation. Joe is a member of the faculty at Drexel University's LeBow College of Business where he serves as an adjunct professor of marketing. Joe teaches a course called "Services Marketing" a study of the evolution of the U.S. economy over the last 300 years. He has also appeared as a guest lecturer for over 15 years at the university where he continues to lecture on the opportunities in the entrepreneurial world.

In July 2001, Joe obtained both a Masters of Science degree in Financial Services and the Accredited Estate Planner designation from the American College in Bryn Mawr, Pennsylvania. Joe holds a license as an Investment Adviser Representative with Eagle Strategies, LLC, a registered investment adviser. At Berardi, Auteri & Associates LLP, Joe's areas of expertise include financial planning and estate planning strategies, business succession planning as well as institutional and private asset management.

In November of 2003, Joe received the designation of "Academic Fellow" from the European Academy for Economic and Cultural Relations for his distinguished work in the fields of Finance and Economics. In 2007, Joe co-founded AMS Global Holdings, LLC a real estate investment management and holding company. At AMS Global Holdings, LLC, Joe serves as Managing Partner and Chief Executive Officer.

Joe is a member of the Philadelphia Estate Planning Council, the Delaware Valley Planned Giving Council, the National Association of Insurance and Financial Advisers, and the Million Dollar Round Table. Joe serves as the Executive Vice President and Treasurer of the National Italian American Political Action Committee, and is a member of the board of directors of the Italy-America Chamber of Commerce of Greater Philadelphia.

Joe also serves as a member of the Armed Services Committee at The Union League of Philadelphia and is the Chairman of the board of directors for the Ramsey Educational Development Institute. He is a member of the Board of Governors of Drexel University's Alumni Association, a member of the Center for the Study of The Presidency and the Foreign Policy Research Institute.

In April 2008, Joe served as international campaign co-manager for the Honorable Cavaliere Amato L. Berardi, in his election to the Parliament of the Republic of Italy. Joe currently serves as Senior Economic Advisor to the Honorable Cavaliere Amato L. Berardi.

In November 2008, Joe became a Knight Templar of the Sovereign Military Order of the Temple of Jerusalem, the Grand Priory of the United States, the Priory of Philadelphia.

Joe and his wife Diana have three children Joseph, Giuliana and Anthony; they reside in Drexel Hill, PA. Joe enjoys snow skiing, traveling and reading. Joe is also fluent in English and Italian.