

# JOSEPH P. DEFAZIO, CRPC®, PHD

## EDUCATION

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2001-2005 Mercyhurst College Erie, PA

- Bachelors of Arts in Business Administration with Concentrations in Finance, Marketing, and Management.
- GPA: 3.62 overall/3.75 in Business.

2008-2009 California University of PA California, PA

- Masters of Science in Business Administration.
- GPA: 3.42 overall.

2011-2015 Northcentral University Prescott Valley, AZ

- PhD in Business Administration with a Concentration in Financial Management.
- Dissertation: "The Relationship of a Match and Mismatch of the Social Style Profile on Practices of Communication and Counseling in the Financial Planner-Client Relationship."

Licenses and Designations

- Designated as a Chartered Retirement Planning Counselor

## EXPERIENCE

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2004-2008 Ameriprise Financial Pittsburgh, PA

### **Financial Advisor**

- Worked as a comprehensive financial planner and was responsible for acquiring new clients and helping them reach and maintain their financial goals.
- Worked as an Advisor Coach in which duties included training and covering appointments for new advisors.
- Instructed daily morning classes in which duties included teaching new and existing advisors all concepts of comprehensive financial planning.

2008 National City Bank Bethel Park, PA

### **Financial Consultant**

- Worked as a financial consultant providing investment advice for high net worth bank customers.
- Instructed a weekly class educating bankers on various investment concepts.

2009-Present University of Phoenix

**Faculty**

- Work as an online instructor for business courses.

2010-Present Pittsburgh Financial Planners Bridgeville, PA

**Associate Financial Planner**

- Work as a comprehensive financial planner with company founder, James Helba.

2012-Present Strayer University Pittsburgh, PA

**Faculty**

- Work as an adjunct faculty member and online instructor for the School of Business.

2010-Present Point Park University Pittsburgh, PA

**Faculty**

- Work as faculty member for the School of Business and School of Communications.

AWARDS/ACTIVITIES

- Member of Mercyhurst tennis team and named Academic All American.
- Worked as a Resident Assistant for Mercyhurst College Residence Life.
- Member of the Business Honor Society, Delta Mu Delta.