

your dreams, your legacy, our passion.



Mr. Joseph A. Auteri received a Bachelor's of Science degree in Business Administration with a dual major 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.

In July 2001, Joe obtained a Master of Science degree in Financial Services from the American College in Bryn Mawr, PA. Joe is also an Investment Advisor Representative with Eagle Strategies LLC, a registered investment adviser.

At Berardi & Auteri, LLC, Joe's areas of expertise include fee-based financial planning, estate planning, exit planning for business owners, and institutional and private asset management. In November 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.

Joe is a member agent of The Nautilus Group® as well as a member of the Philadelphia Estate Planning Council, the Delaware Valley Planned Giving Council, and the National Association of Insurance and Financial Advisers. Joe is also a member of the Association of Advance Life Underwriters, the National Association of Insurance and Financial Advisers and is a Life and Qualifying member of the Million Dollar Round Table.* Joe volunteers a significant amount of his time to a number of for profit and non-profit organizations:

- President & CEO, Italy-America Chamber of Commerce of Greater Philadelphia
- Chairman, Board of Directors for the Ramsey Educational Development Institute
- Member, Center for the Study of the Presidency
- Member, Foreign Policy Research Institute
- Member, Armed Services Committee at the Union League of Philadelphia

Joe also gives back to his community by generously sharing his expertise for a number of academic organizations, supporting his commitment to higher education.

In 2006 Joe was elected to the steering committee for the New York Life Political Action Committee. He has lobbied Congress on behalf of New York Life and the financial services industry for responsible tax reform, and in 2004 was a member of the lobbying team that worked with Congress to repeal IRC Sec. 809 (*The Mutual Company Add-on Tax*).

Joe is a 32° Master Mason and is a member of Columbia Lodge 91 F&AM, of the Grand Lodge of PA. Joe and his wife, Diana, have three children and reside in Drexel Hill, PA. Joe enjoys snow skiing, traveling and reading. Joe is fluent in English and Italian.

* MDRT is recognized throughout the industry as the standard of excellence in life insurance sales performance.