

Joe Foster

President, Financial Advisor

Joe works with individuals and families to protect their legacies, to make working for money optional, and to strategize their charitable planning in order to redirect tax dollars to the causes important to them.

After earning a degree in Accounting from the University of Texas at Austin in 1983, he joined Peat, Marwick, Mitchell & Co. (now KPMG) as a CPA before entering the field of financial services in 1987.

In 2020, Joe was awarded the Lester A. Rosen Humanitarian and Achievement Award. This award honors exceptional achievement, outstanding character and integrity, and a generous lifestyle of giving in service to humanity.

Joe enjoys exercising and playing golf, but his real passion is his relationships with friends, clients, and, most important, his family. He and his wife, Kelly, have been happily married since 1988 and have three adult daughters, a son-in-law, and a granddaughter.

