



GET TO KNOW JOE!

01

CARROLL, OH

Joe grew up in a rural community where he was surrounded by hardworking and honest people. Joe grew up working with his father, Joe Sr., where he was taught how to run a business and the importance of doing things the right way.

02

PROFESSIONAL

Joe is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional, a prestigious industry credential that requires holders to demonstrate their experience, expertise and ethics.

03

FAITH

Joe is a Certified Kingdom Advisor (CKA®). His Christian worldview is important to him and the CKA® empowers him to do financial planning from a biblical perspective.

04

PUBLISHED IN KIPLINGER

Joe's writing has been featured in Kiplinger, a nationally recognized publication for personal finance. Go to kiplinger.com to read his most popular article: "I Love Roth IRAs and Roth Conversions!"

05

HOOPS ERA 1: PLAYER

Joe played basketball in high school and college. He scored 1,000 career points at Bloom Carroll High School, and again at Mount Vernon Nazarene University.

06

HOOPS ERA 2: COACH

Joe coaches and sponsors a premier youth AAU basketball team at the Nova Village Athletic Club.

07

IRONMAN

Joe has completed an Ironman triathlon (2.4-mile swim, 116-mile bike race and 26.2-mile run, all in less than 12 hours!). Joe also has qualified for the Boston Marathon.

Peak Retirement Planning, Inc.
3600 Olentangy River Road, Building 501
Columbus, OH 43214 | 614-500-4121
info@peakretirementplanning.com
peakretirementplanning.com

JOE F. SCHMITZ JR.
CFP®, CHFC®, CKA®
Owner & CERTIFIED FINANCIAL PLANNER™



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