



Carlo Panaccione, CFP®

LPL Registered Principal

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Within minutes of first meeting Carlo you can't help but recognize his genuine passion for making a positive difference in the lives of the people he comes in contact with each and every day. Since 1986, Carlo has provided the financial advice, education, and services that have resulted in him being featured in such business media outlets as CNBC, Fox Business News, ABC News, NY Times, MSN Money, Barron's, Businessweek, Worth and Bloomberg. A

nationally acclaimed advisor, Carlo appreciates the recognition that he has received, but finds his greatest achievement has been his clients' trust and friendship.

Carlo's principles and work ethic were instilled in him by his parents and extended family when he was a young boy in his family's Italian restaurant, where he learned the values of hard work, personal ethics, service, and building personal relationships. Carlo is described as a thoughtful, deliberate, and hands-on professional. Treating clients like family means more than enjoying their company and caring about their interests; it also means assuring that they receive professional advice, a sincere advocate and service that is good enough for family.

Carlo has many interests which revolve around spending time with family and friends and include entertaining, travel, wine, and skiing, as well as preparing the family recipes he learned during his childhood. Carlo and his wife Julie have been married since 1995 and reside in Los Altos Hills with their three children, Madeline, Nicholas and Isabella. Carlo was certified as a CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®) in 1993 by the College for Financial Planning in Denver, and is a member of the Financial Planning Association. He earned a BA in Communications with a minor in Business in 1983 from California State University, Chico. Carlo is active with several charities and his children's sports.

Carlo Panaccione is a registered principal with and securities are offered through LPL Financial, member FINRA/SIPC. CA Insurance License #0714340.