



INSIGHTS

Speaker Biography

Joseph M Gordon
AIFA®, CIMA®, CFP®
Gordon Asset Management, LLC

With over 30+ years in retirement plan consulting and investment management, Joe brings extensive experience and credentialing to help solve our plan sponsor issues, whether plan design and employer budget based, or fiduciary issues in controlling plan expenses, investment menu selection and monitoring, and documenting the process by which all fiduciary decisions are made.

Joe graduated from UNC-Chapel Hill with a B.S. in Business.





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Mario C. Giganti

Mario Giganti is a Principal at Cornerstone Capital Advisors (“CCA”) and a nationally recognized investment expert in teaching, training and working with clients in implementing defined Best Practices into a Prudent Investment Process. He works with individual clients and families in integrating the concepts of the financial planning process into their daily lives, provides investment advisory services to qualified plans and endowments, and is an adjunct faculty member for Fiduciary 360 in Pittsburgh. Over the last 8 years, Mario has trained hundreds of advisors and investment committee members in understanding how to implement a best practice investment process. Recently, Cornerstone Capital Advisors received its CEFEX Certification Registration which signifies that an independent analyst has attested to the fact that CCA’s investment process meets a Fiduciary Standard of Care.



In 17 years of professional experience, Mario has worked for a major accounting firm, 2 national brokerage firms, and for the last 10 years with CCA. Among his professional affiliations and designations is the National Association of Personal Financial Advisors, where Mario and his firm have taken a “fiduciary oath” to do only what is in the best interest of their clients. In doing so, CCA serves clients as a “fee-only” advisor and no longer hold insurance or brokerage licenses to sell products.

He is involved in the professional and non profit communities in various roles. In 2004, he was recognized as Walsh’s “Outstanding Alumnus of the Year” for his personal, professional and community activities. In 2006, he was elected into the Walsh University “Wall of Fame” for his accomplishments on the soccer field. Mario, his wife Kim and sons Michael & Vincent reside in Uniontown, Ohio.