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Joe Lumarda is a Senior Vice President and Investment Counselor for Capital Group Private Client Services. He works directly with high net worth individuals and families to create customized plans for protecting and growing their wealth, often across multiple generations. Joe also helps nonprofit foundations and endowments to pursue their long-term financial objectives through effective planning and investment management.

Prior to joining our organization in 2006, Joe spent 16 years at the California Community Foundation as a vice president for development, executive vice president and chief operating officer. He also served as an independent director for Capital Research and Management Company's Endowment funds, a series of investment portfolios designed exclusively for nonprofit organizations. Joe also served as an officer in the U.S. Navy for three years.

He earned an EMBA from Claremont Graduate University and a BA in philosophy from Saint John's Seminary College. He is a member of the board of the California Wellness Foundation, Southern California Grantmakers, Asian Americans Advancing Justice, and St. Joseph Healthcare Foundation.

Joe is based in our Los Angeles office.