



At a Glance

- ✓ Regional Director for Midwest Region
- ✓ Responsible for raising assets in Dunham's asset allocation models, mutual funds, and trust services
- ✓ Received his B.A. from Montclair State University
- ✓ Holds FINRA Series 7, 65, 63 registrations

Joseph Dinaso Midwest Regional Director

Joseph Dinaso is the Regional Director for the Midwest Region at Dunham & Associates Investment Counsel. In this position, Joe promotes Dunham's services among financial advisors and creates investment analytics proposals. In addition, Joe works with advisors to help discover new opportunities with the goal of growing their practices.

At Dunham, Joe specializes in the firm's products among financial advisors, which include advisory, mutual funds, and trust services. Joe is also responsible for raising assets between Dunham's asset allocation models, mutual funds, and trust services.

Before being promoted to the Regional Director position, Joe worked at Dunham as a Regional Marketing Associate for the Mid-Atlantic division, assisting in the sales growth of the region. Originally from Point Pleasant, New Jersey, Joe started working in finance in 2013. His experience covers capital markets, including fixed income, equities, and alternatives.

Prior to joining Dunham & Associates, Joe was an internal consultant for Prudential Investments for three years and prior to that Joe was a financial advisor. In his free time, Joe watches sports, spends time at the gym and with his family. He enjoys cheering for the Green Bay Packers, the New York Mets, and the New York Knicks.

Joe received his B.A from Montclair State University and holds FINRA Series 7, 65, 63 registrations along with Life & Health Insurance licenses.

About Dunham & Associates

In 1985, Jeffrey Dunham founded Dunham with the uncommon idea that fees paid by clients should be tied, in some way, to the performance of the investments they own. Today, Dunham and Dunham Trust have grown to become a multi-billion dollar firm, but we are still driven by the values of fairness and accountability that Jeffrey envisioned more than three decades ago.