



## Joe Ellis

Investment Adviser Representative

### Get to know Joe...

Joe was born in Charleston, West Virginia, and moved to Kentucky in 1962. He graduated from Bryan Station High School in Lexington in 1972 and from Somerset Community College in 1976.

Joe has always admired his parents for running successful restaurant, Ellis Dairy Dee in Russell Springs, Kentucky, for twenty-one years while also rearing his four brothers and one sister. From 1980 to 1986 he worked with them as part owner and operator.

In April 1986 Joe took a job with Walmart where, for the next twenty years, he served as Assistant Manager or Store Manager. He also spent another eight years as an hourly employee before retiring in April 2014 and devoting his time to family and the insurance and investments business.

Joe had already obtained his Life & Health Insurance license with the state of Kentucky in May 2007, and in June 2008 he obtained his Series 65 Security license. Before joining Visionary Horizons Wealth Management, Joe worked for Merit National Fund Advisors in Somerset, Kentucky, and Future Assurance, Inc., as an insurance agent, offering life, health, Medicare, and annuities.



From 1976 through 1986, Joe made money on the side as a fishing guide on Lake Cumberland, and he still loves fishing. Joe attends Oak Hill Baptist Church where he stays involved with many activities in the church and its missions. He just returned from a trip to Guatemala and looks forward to taking many more to serve the needs of those less fortunate and share the gospel.



### Contact Joe

357 Langdon Street

Somerset, KY 42503

Office: 606-416-5553

Fax: 606-416-5554

[joe@visionaryhorizons.com](mailto:joe@visionaryhorizons.com)

**Visionary Horizons, LLC** is a SEC-Registered Investment Advisor located in Knoxville, TN. Clients establish fee-based accounts with a third party custodian, such as Charles Schwab & Co., (Schwab), TD Ameritrade Institutional, a Division of TD Ameritrade, Inc. ("TD Ameritrade) or MTG, LLC dba Betterment Securities ("Betterment Securities). All three firms are independent and unaffiliated SEC-Registered broker-dealers and members of the Financial Regulatory Authority ("FINRA") and the Securities Investor Protection Corporation ("SIPC"). These firms offer us services which include custody of securities, trade execution, clearance, and settlement of transactions.

Securities offered through Pershe Kaplan Sterling Investments, Member FINRA/SIPC. Headquartered at 18 Corporate Woods Blvd., Albany, NY12211. Purshe Kaplan Sterling Investments and Visionary Horizons, LLC are not affiliated companies.