



WBI Welcomes Joseph Merlo

RED BANK, NJ — WBI, a leading provider of wealth-building strategies targeting an optimal blend of bear market protection and bull market return, has announced the hire of Joseph (Joe) Merlo as Director of Sales.

Mr. Merlo brings over 10 years of experience in the financial industry. Prior to joining WBI, Joe spent 7 years at Lord Abbett & Co. LLC. Most recently Joe was Director, Regional Representative and managed several wholesalers along with covering the Northeast territory for independent, bank and RIA channels. Prior to Lord Abbett, he worked for Oppenheimer & Co. Inc. and Maxim Group in private wealth management. Joe received his Bachelor's Degree in Finance from Fairleigh Dickinson University where he was a founder of the Finance Club and holds his Series 7, 63, 65 and 24 licenses.

Mr. Merlo has successfully developed and managed client relationships over the course of his career. Joe has proactively worked to grow total assets, improve team productivity, and enhance sales. Mr. Merlo has an extensive background in finance along with proven experience cultivating new relationships. Joe's passion for finance and sales will be of tremendous value as he leads our national sales team in partnering with our financial advisors.

WBI is excited to welcome Joe to the sales management team as our company continues to expand.

About WBI

At WBI, we have managed risk to capital for institutions and private investors for over 30 years. Our time-tested active process is index agnostic and has no mandate to be fully invested. For us, cash is a tactical weapon that can help us reduce loss so we can be positioned to buy low and sell high. For more information please visit our website at wbiinvestments.com.

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