

Dan Carter, CFP® Managing Director & Partner



Dan is a Partner & Managing Director with Oxford Harriman & Company in the Westlake, Ohio Office.

Dan seeks first to understand his clients' current situation, concerns, risk tolerance, and their financial priorities. He then uses this information to formulate an investment strategy and begins the development of a comprehensive investment plan.

Dan began his career with Edward Jones Investments in 2002. In 2011, he earned the CERTIFIED FINANCIAL PLANNER™ certification (CFP®). The CFP® certification identifies those individuals who have met the rigorous experience and ethical requirements of the CFP Board and have successfully completed coursework on financial topics in the following areas: general principles of financial strategies, insurance planning and risk management, employee benefits planning, and retirement and estate planning strategies.

CFP® certificants also agree to meet ongoing continuing education requirements.

Prior to joining the financial services industry, Dan earned his B.S. in Marketing from The University of Akron.

A Northeast Ohio Native, Dan and his wife, Erin, reside in Westlake, Ohio. They have two children, Victoria, and Grant. Spending time with their young family is the top priority for Dan and Erin. The children enjoy regular trips to the Cleveland Metroparks Zoo, reading books and playing outdoors. Dr. Erin Cooper owns and operates Westside Behavioral Health, a successful mental health practice located in Westlake, Ohio.

Dan enjoys playing golf and exercising to stay in shape. Dan is also an avid Cleveland Sports Fan. Both Dan and Erin are active supporters of The Foundation of Prader-Willi Research and Prader-Willi Association USA.

Crocker Park Office

159 Crocker Park Blvd
Suite 300
Westlake, OH, 44145

Oxford Harriman Offices

Akron, Ohio

Astoria, New York

Cleveland, Ohio

Detroit, Michigan

Mentor, Ohio

Woodcliff Lake, New Jersey

Park Avenue, New York

Sarasota, Florida

Saratoga County, New York

oxfordharriman.com

ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. We chose to partner with Wells Fargo Advisors Financial Network because they offer a variety of resources available to our clients including access to industry research, technology and world class products. Together, we are able to offer a full-service platform with comprehensive wealth management strategies, including access to lending services through Wells Fargo affiliates.

www.wfafinet.com

Wells Fargo Advisors Financial Network is not a legal or tax advisor. Be sure to consult your own tax advisor and investment professional before taking any action that may involve tax consequences. Trust services available through banking and trust affiliates in addition to non-affiliated companies of Wells Fargo Advisors. Wells Fargo Advisors and its affiliates do not provide legal or tax advice. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC, a registered broker-dealer and a separate non-bank affiliate of Wells Fargo & Company. ©2022 Wells Fargo Advisors Financial Network, LLC. All rights reserved. Oxford Harriman & Company is a separate entity from WFAFN. CAR-0822-03854