

## Dan Carter, CFP® Managing Director & Partner



### Contact Dan Carter

#### Westlake Office

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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. 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.

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