

# Thomas C. Erb

## Senior Managing Director & Partner



2024 AdvisorHub Advisors to Watch - 100 Solo Advisors to Watch\*

2020, 2021 & 2022 Wells Fargo Advisors Financial Network Platinum Council\*\*

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Tom is a Senior Managing Director and Partner with Oxford Harriman, and a member of the practice's investment committee.

Prior to joining Oxford Harriman, Tom was a Senior Vice President for Wells Fargo Advisors in Pepper Pike, Ohio.

Tom has spent his entire career in the financial services industry and has been interested and active in the stock market for as long as he can remember. Tom is a third-generation financial advisor, as both his father and grandfathers worked as stockbrokers for over fifty years, and eventually owned and operated a broker dealer. Tom takes great interest in benchmarking famous investors who pioneered strategic value investing.

Tom takes pride in putting his client's interest first and strives to build deep relationships with his clients. Tom's relationship with his clients is the foundation for helping them reach their financial goals. Tom has a mission to help every client plan for a secure financial future in a way that best meets his or her goals.

Tom takes a dynamic approach to planning as he believes it is not a static event. As a client's life circumstances change, so must the investment strategies implemented to stay on course toward meeting objectives. Tom works with each family to design and implement planning targeted to their specific needs and goals. These plans include helping clients understand how much income is necessary to fund retirement, and making sure strategies are incorporating these needs. Tom also helps clients stay current with tax law changes and estate plan issues to help preserve wealth – now and for generations to come.

Tom graduated from Miami University in Oxford, Ohio and received his bachelor's degree in business administration.

Tom is passionate about giving back to the community and has served as a board member on several non-profits and endowments.

Tom and his wife Lauren reside in Bentleyville, Ohio and are doting parents of their two young children, Dalton and Kendall.

### ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN. PM-01242026-6825788.1.1