

## Thomas C. Erb Managing Director & Partner



**100 Solo Advisors To Watch In The U.S. for 2023 (AdvisorHub\*)**

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

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

Prior to joining Oxford Harriman, Tom was a Senior Vice President for Well 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 builds 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 and protect 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

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\* The AdvisorHub 2023 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria from December 31, 2021 to December 31, 2022. Investment performance is not a criterion. A self-completed survey was used for consideration. A2W winners are redefined into sub categories and then ranked with the sub category based on scale, growth, and professionalism. The rating and ranking are not related to the quality of the investment advice and based solely on the disclosed criteria. Being placed on the sub category does not denote an additional award.

\*\*The Platinum Council (previously known as Premier Advisor) distinction is held by a select group of Financial Advisors within Wells Fargo Advisors Financial Network as measured by completion of educational components, business production based on the past year, and professionalism. Additional criteria, best practices and team structure, may also be used to determine recipients.

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