

## Daniel J. Bezik, CRPC® Managing Partner



### Contact Daniel Bezik

#### Mentor, OH Office

8039 Broadmoor Road, Suite 12  
Mentor, OH 44060

440-269-8041

dbezik@oxfordharriman.com

Mr. Bezik presently serves as a Managing Partner of Oxford Harriman & Company and is a member of the practice investment policy committee.

Dan has over 25 years of experience in the financial services industry. Prior to joining Oxford Harriman Dan spent 20 years running an independent practice affiliated with Wells Fargo Advisors Financial Network.

Dan primarily focuses on retirement planning with his clients, working with them from the wealth accumulation phase prior to retirement, through the distribution phase of retirement. After helping his clients define their vision for retirement, Dan helps them build a roadmap to guide them through the process. This includes designing, implementing, and managing investment strategies designed to meet each client's specific requirements.

Dan attended Cleveland State University and received his BBA with a major in

Quantitative Business Analysis.

Dan earned the Chartered Retirement Planning Counselor® designation (CRPC) through the College for Financial Planning. Individuals who hold the CRPC designation have completed a course of study encompassing pre-and-post-retirement needs, asset management, estate planning and the entire retirement planning process using strategies and techniques from real client situations.

A lifetime resident of Lake County, Ohio Dan and his wife, Kathleen have been married for 7 years and currently reside in Mentor, Ohio.

Dan's passion includes coaching youth volleyball. He has coached top ranked youth volleyball Junior Olympic teams and coaches at the High School level in his community. Dan also enjoys golf, and spending time with his family and friends when not working or coaching.

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