Robert (Bob) Wert
President

2006-2025 Wells Fargo Advisors Platinum Council Member

Forbes Best-In-State Wealth Advisor 2018-2025

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Robert "Bob" Wert is the President of Longview Private Wealth Management, an affiliate of Oxford Harriman & company. He is based in Wyomissing, Pennsylvania. With over four decades of experience in wealth management, Bob is recognized for his commitment to delivering exceptional service, strategic insight, and personalized financial guidance to individuals, families, businesses, and non-profit organizations.

Before joining Oxford Harriman & Company, Bob spent forty years at Wells Fargo Advisors and its predecessor firms, where he served as Managing Director. He was a long-standing member of the firm's prestigious Platinum Council (2006-2025), an honor awarded to a select group of advisors who demonstrate excellence in education, production, professionalism, and best practices. Bob also founded the Wert Investment Consulting Group at Wells Fargo Advisors, providing elite advisory services to a select clientele.

Bob holds an MBA in Finance from the University of Chicago and a BBA in Business from Pennsylvania State University. He also completed the Securities Industry Institute program at the Wharton School of the University of Pennsylvania. His professional achievements have been widely recognized, including being named a Forbes Best-In-State Wealth Advisor for eight consecutive years (2018–2025).

Deeply committed to community service, Bob is an active member of the Berks County Association of Fundraising Professionals. Bob is the Chairman of the Investment Committee of the Diocese of Allentown and a Member of the Finance Council.

Bob and his wife, Mary Elizabeth, reside in Lower Heidelberg Township. They have three children and he is actively involved in the Berks County community.

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-03102027-8375276.1.1

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2024 and 2025: The Platinum Council distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by business production from the previous year and professionalism.

2023 and prior: The Platinum Council distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by one or more of the following: completion of educational components, business production from the previous year, and professionalism. Additional consideration may have included best practices and team structure.

2025 Forbes Best-In-State Wealth Advisors; Awarded April 2025; Data compiled by SHOOK Research LLC based on the time period from 6/30/23- 6/30/24. 2024 Forbes Best-In-State Wealth Advisors; Awarded April 2024; Data compiled by SHOOK Research LLC based on the time period from 6/30/22 - 6/30/23. 2023 Forbes Best-In-State Wealth Advisors: Awarded April 2023; Data compiled by SHOOK Research LLC based on the time period from 6/30/21 - 6/30/22. 2022 Forbes Best-In-State Wealth Advisors: Awarded April 2022; Data compiled by SHOOK Research LLC based on the time period from 6/30/20 - 6/30/21. 2021 Forbes Best-In-State Wealth Advisors: Awarded February 2021; Data compiled by SHOOK Research LLC based on the time period from 6/30/19 - 6/30/20. 2020 Forbes Best-In-State Wealth Advisors: Awarded January 2020; Data compiled by SHOOK Research LLC based on the time period from 6/30/18 - 6/30/19. 2019 Forbes Best-In-State Wealth Advisors: Awarded February 2019; Data compiled by SHOOK Research LLC based on the time period from 6/30/17 - 6/30/18.

2018 Forbes Best-In-State Wealth Advisors: (Awarded February 2018; Data compiled by SHOOK Research LLC based on the time period from 6/30/16 - 6/30/17 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.