Claudia Wert

Vice President, Financial Advisor

Contact Claudia Wert

Wyomissing, PA Office

1200 Broadcasting Rd, Suite 103
Wyomissing, PA 19610

484-317-8254

claudia.c.wert@wfafinet.com

Claudia Wert is Vice President, Financial Advisor at Longview Private Wealth Management, serving clients from the team's Wyomissing, Pennsylvania office. She specializes in employer-sponsored retirement plans, including traditional 401(k), safe harbor, 403(b), SIMPLE, SEP, and Single K plans. Claudia works closely with business owners, plan sponsors, and fiduciaries to help navigate the complex regulatory environment, helping to ensure plans are structured to meet both compliance requirements and the needs of participants.

Her expertise includes assisting organizations with selecting appropriate plan providers, reviewing plan features, services, and costs, and developing strategies to help increase plan participation. Known for her diligence and client-focused approach, Claudia is committed to providing retirement solutions that align with both organizational goals and participant success.

Claudia began her career in wealth management in 2013 when she joined the Wert Investment Consulting Group at Wells Fargo Advisors. She holds her FINRA Series 7 and 66 securities registrations, as well as insurance licenses. In 2017, she earned her bachelor's degree in finance from St. Joseph's University. Passionate about financial education, Claudia dedicates time to promoting financial literacy in the community.

Beyond her work in financial services, Claudia is a member of the North Staffordshire Living History Association, which honors the memory of British servicewomen during World War II.

Claudia resides in Pennsylvania with her husband and their newborn son, cherishing time with her family and pursuing her personal and charitable interests.

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

oxfordharriman.com

www.wfafinet.com