

Teresa E. West

Director of Operations



Contact Teresa West

Wyomissing, PA Office

1200 Broadcasting Rd, Suite 103
Wyomissing, PA 19610

484-317-8251

teresa.west@wfafinet.com

Teresa “Terri” West serves as the Director of Operations for Longview Private Wealth Management. She brings more than 35 years of experience in financial services, human resources, and payroll administration. Terri is dedicated helping ensuring that clients’ operational and administrative needs are met with accuracy, efficiency, and the highest level of professionalism. She takes pride in consistently exceeding client expectations and delivering exceptional service.

Before joining Longview Private Wealth Management, Terri held the same position with the Wert Investment Consulting Group of Wells Fargo Advisors beginning in 2019. Her career began with Hill Financial Savings and Loan, later acquired by Meridian Bank, where she attended the American Institute of Banking. Over the years, she worked with eight predecessor banks that eventually became Wells Fargo Bank, N.A.

In addition to her professional expertise, Terri has been actively involved with Wells

Fargo’s financial literacy initiatives and community programs. She currently holds Life and Health Insurance licenses and serves as a Berks County Notary.

A resident of Berks County for nearly two decades, Terri is deeply committed to her community. She has volunteered her time with organizations including the Veterans of the VFW Post, the Berks County Food Bank, the Children’s Home of Reading, the Berks County Breast Cancer Center, and most recently with Eastern Berks and cleaning up the homeless encampment in Pottstown.

Outside of work, Terri enjoys spending time with her family, especially her granddaughter and grandson. She also loves gardening, kayaking, baking, and traveling, and is happiest when spending time outdoors. She resides in Robeson Township.

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