OXFORD | HARRIMAN & COMPANY

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Becky is a Senior Wealth Planner with Oxford Harriman & Company in its Cleveland, Ohio office.

Providing support for Senior Managing Director & Partner Thomas C. Erb, Becky's role is to develop comprehensive, practical financial planning solutions for clients in every life chapter: accumulators; pre-retirees; and retirees. Becky is passionate about helping clients feel confident about every aspect of their financial lives.

Becky focuses on providing ongoing solutions in the areas of retirement planning; tax strategies; investment planning; cash flow management; and protection strategies. She believes that the best financial advice is personalized for each client and delivered over time, as goals; life circumstances; and regulatory rules may change.

Becky has worked in the financial services industry since 2003. She is a CFP® practitioner and has held her FINRA Series 7 and Series 66 licenses, as well as her Ohio Life and Health Insurance license, for over 20 years. Becky earned her Bachelor of Arts degree in English at Ohio University and her MBA degree at Franklin University.

Community service is an important part of Becky's life. She is active on several committees at her church, including leading a team that performs random acts of kindness for people in the church and the community. Becky and her husband Jon own a small hobby farm, including horses and chickens, where they reside with their sons Brian and Gavin.