



## PARTNER PROFILE

### Erik Berry

#### Senior Partner, Director of Research

With a background in software engineering and data analysis, Erik brings specialized technical skills to the WealthPath team. Erik has an undergraduate degree in computer science from Rhodes College and a master's degree in computer science from Washington University in St. Louis, in addition to spending a semester at St. John's College in Oxford.

After graduate school, Erik taught computer science at Washington University and then worked as an independent consultant and software developer for over a decade on enterprise software projects, before helping to co-found WealthPath in 2011.

As a partner and registered financial advisor at WealthPath, his focus is on research, financial planning, portfolio management, retirement plan consulting, and software selection and development.

His mission is to make sure all WealthPath clients are confident they have found a knowledgeable and caring partner to assist in navigating complex financial decisions. Erik enjoys helping clients develop a financial plan that helps them sleep well while keeping their long-term goals in mind.

Erik lives in Rogers, Arkansas with his wife and their two children. In his free time, Erik enjoys reading, cycling, Arkansas Razorback athletics, and independent movies. He has been a long-time supporter of the Ozark Natural Science Center's educational mission and Habitat for Humanity.

#### AREAS OF FOCUS:

- Investment research and strategies
- Risk management
- Retirement plan design & consulting
- Qualified plan compliance services
- Corporate technology
- Collective investment trust management
- Financial planning for individuals and families
- Business strategy

#### EDUCATION:

Washington University in St. Louis  
Master's Degree, Computer Science

Rhodes College  
Bachelor's Degree, Computer Science

St. John's College, Oxford, England  
Undergraduate Studies

#### REGISTRATIONS HELD:

- Series 65

#### CONTACT:

##### Home Office

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[www.wealthpath.net](http://www.wealthpath.net)