Local Financial Firm, Harlow Wealth Management, Honors Advisor, Dan Erickson in Earning Respected Certification

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Vancouver, Washington – Area licensed financial advisor and insurance professional Dan Erickson, of Harlow Wealth Management, recently earned the highly regarded CFP® certification as an accredited Certified Financial Planner™.

Erickson, CFP®, Certified Public Accountant (CPA), Investment Adviser Representative (IAR) having passed the FINRA Series 65 exam in 2013, and insurance agent holding life insurance licenses of Harlow Wealth Management, has been authorized by the Certified Financial Planner Board of Standards (CFP Board) to use the CERTIFIED FINANCIAL PLANNER™ and CFP® certification marks in accordance with CFP® Board certification and renewal requirements. Mr. Erickson has worked at Harlow Wealth Management since 2013 serving SW Washington and the Portland metro areas, and is responsible for helping clients reach their retirement goals.

Erickson qualified for tuition assistance as part of the Harlow Wealth Management continuing education program offered to employees who are dedicated to growing in their field. The CFP® marks identify those individuals who have met the rigorous experience and ethical requirements of the CFP Board, have successfully completed financial planning coursework and have passed the CFP® Certification Examination covering the following areas:

- The financial planning process
- Risk management
- Investments
- Tax planning and management
- Retirement and employee benefits
- Estate planning

CFP® professionals also agree to meet ongoing continuing education requirements and to uphold CFP Board’s Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards.

About Harlow Wealth Management:
Harlow Wealth Management is an independently owned and operated Registered Investment Advisor firm (RIA) that helps retirees and those approaching retirement plan financially. We serve clients living in the greater Portland metropolitan and southwest Washington areas, with an office in Clackamas, Oregon, and our corporate headquarters in Vancouver, Washington. While our firm was officially created in 2005, our founding president, Danny Harlow, has been serving the retirement financial planning needs of our community since 1973.

About CFP Board
CFP Board is a nonprofit certification organization with a mission to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with plaque design) and CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements. CFP Board currently authorizes more than 80,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net.

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