Eric P. Meek

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Financial Advisor/Consultant

Accomplished and resourceful professional with comprehensive experience in advising and supporting clients on wealth management, retirement planning, investments and insurance. Demonstrated in-depth knowledge and understanding of financial markets and sound business judgment.

Highly motivated and results-focused with a well-established track record of surpassing goals and exceeding customer expectations in highly competitive markets. Proven ability to develop strong relationships with clients and bank employees as well as a wide network of professional contacts across the banking and brokerage industry.

Areas of Expertise

- Retirement Planning & Execution
- Wealth Management
- Portfolio Management
- Financial Risk Assessment
- Profit & Revenue Maximization
- Team Building & Leadership

Career Experience

Huntington Financial, San Marino, CA
Founder, Registered Principal, 2004 – Present

Lead, direct, and control overall operations of the firm and implement best practices to streamline and continue functions. Provide expert advice to over 80 households (200 accounts) by evaluating and assessing their risk tolerance and financial objectives then devising customized portfolios and retirement plans to achieve those goals. Revise and adjust each portfolio as per clients' needs, goals, and overall strategy. Maintain proper check and balance on transactions as registered principal for four licensed financial advisors.

Key Contributions:

- Established Huntington Financial from scratch as a full-service Brokerage and Insurance Services firm.
- Built and managed a client base with more than $60M in Assets Under Management (AUM).
- Earned Jackson National Life's "Stars Club" in 2009, 2010, and 2016 for top annuity sales.

WM Financial Services, San Gabriel Valley, CA
Senior Financial Consultant, 1994 – 2004

Delivered support to 800 businesses and individuals in devising and executing financial strategies. Directed financial analysis on quarterly and annual basis to confirm portfolios aligned with client's goals. Conducted seminars, training classes, and contests on investment education, relationship building, and referral cross-selling to Washington Mutual branch staff. Trained and mentored three different full-time assistants and helped in advancing their careers.

Key Contributions:

- Ranked in the top 2% nationally in market share growth, generated $150M AUM of new business.
- Attained President's Club/Leaders Circle consecutively from 1998 to 2003 for securing top 10% sales nationally.
- Exceeded annual sales goals every year of employment.

Additional experience:

***Vice President Investments** at Wedbush Securities, Los Angeles CA. **Associate Vice President** at Prudential Securities, Pasadena, CA. **Financial Advisor** at Paine Webber, Pasadena, CA. **Account Executive** at EF Hutton, Los Angeles, CA.*

Education

B.Sc., Urban Planning and Development, University of Southern California, California