



**Erik Carter, J.D., CFP®**

**Personal Financial Coach  
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Erik's experience in financial planning and wealth management ranges from running a branch office for one of the largest brokerage firms in the country and advising members of Congress as a financial adviser on Capitol Hill to serving as a vice president in the private client division of a major brokerage firm in Manhattan. He earned a B.A. degree in economics with honors from NYU and a law degree on a full academic scholarship from the University of San Diego, where he focused on tax and estate planning. When it comes to his finances, he likes to turn to the famed Warren Buffett for guidance, particularly hanging on his words: "I will tell you how to become rich. Close the doors. Be fearful when others are greedy. Be greedy when others are fearful."