



A NEW GENERATION OF INVESTING

Erin Freund is the President and Founder of OakPoint Wealth Management, an independent financial management firm she launched in October 2024 with a vision of delivering highly personalized, relationship-driven wealth management.

With more than 20 years of experience in the financial services industry, Erin has built her career around helping individuals and families navigate financial decisions with confidence and clarity. She began her career in Cedar Rapids, Iowa, as an intern with Securities America while earning her degree in Business Administration and Finance from the University of Iowa. She later went on to join Wells Fargo Bank in Des Moines, where she earned her Series 7 and 66 licenses, now held with LPL Financial, before moving into an institutional wholesale role with Principal Financial Group.

Erin later returned to private banking with Wells Fargo, managing more than \$118 million in assets for high-net-worth clients. Her passion for building long-term relationships and providing individualized guidance ultimately led her to establish her own advisory practice with Principal Securities, Inc., where she also earned the prestigious CERTIFIED FINANCIAL PLANNER™ designation.

Today, through OakPoint Wealth Management, Erin combines personalized service with the powerful technology, research, and investment capabilities of LPL Financial. Her approach is rooted in trust, transparency, and creating tailored financial strategies designed around each client's unique goals and values.

Based in Atlantic, Iowa, with offices in Atlantic and Shenandoah, Erin brings small-town values and a strong sense of community to her work. Raised on a farm, she understands the importance of hard work, meaningful relationships, and serving others with integrity. She is an active member of St. Peter & Paul Catholic Church, where she also serves on the Finance Council. Erin also embraces serving on both the Atlantic Community School Foundation Board and the Great Valley Advisor Group Advisory Committee.

Outside the office, Erin enjoys spending time with her husband, Chris, and their two children. She also enjoys golfing, walking, reading, and making the most of time with family and friends.