



A NEW GENERATION OF INVESTING

Erin Freund, President and Founder of OakPoint Wealth Management, launched her firm in October 2024, bringing 18 years of experience and a client-centered philosophy to her work. Erin began her career in Cedar Rapids, IA, as an intern with Securities America. After earning her degree in Business Administration and Finance from the University of Iowa, she joined Wells Fargo Bank in Des Moines, where she obtained her Series 7 and 66 licenses. Her desire to focus more deeply on securities led her to an institutional wholesale role at Principal Financial Group, where she spent several years refining her expertise.

Driven by a passion for helping individual clients, Erin returned to banking as a Private Bank Relationship Manager, overseeing \$118 million in assets for high-net-worth clients. Eventually, she left Wells Fargo to start her own advisory practice with Principal Securities, Inc., and during this time, earned the prestigious CERTIFIED FINANCIAL PLANNER™ designation.

In 2024, Erin founded OakPoint Wealth Management to provide personalized service with the added strength of LPL Financial's world-class technology, research, and investment platform.

Now based in Atlantic, IA, Erin brings her small-town values and broad financial expertise to her clients. Growing up on a farm, she values the strong connections of her community and prides herself on offering exceptional client service. An active member of St. Peter & Paul Catholic Church, Erin also supports local organizations like the Atlantic Rotary Club and Chamber of Commerce. As her practice grows, she looks forward to expanding her engagement in community initiatives and fostering meaningful connections with both clients and local businesses. She maintains offices in Atlantic and Shenandoah, IA, where her focus remains on delivering highly efficient, tailored financial plans.

Outside of work, Erin enjoys spending quality time with her husband, Chris, and their two children. She loves hitting the golf course, although her skills leave something to be desired—she knows her true expertise lies in financial planning! When she's not golfing, Erin enjoys walking, reading, and cherishing time with family.