PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Erik D. Copeland

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Background & Experience

Erik is a founding partner of MERiTAGE Wealth Insurance Advisors. Since 2004 Erik has worked with advisors and their clients to structure and incorporate insurance as an integral component of their comprehensive wealth plan. His expertise in implementing insurance strategies has helped hundreds of clients to grow and protect their assets as part of their overall wealth transfer and legacy goals.

Mr. Copeland specializes in Estate Planning, Supplemental Income Strategies, Extended Care Planning and Business Succession Planning. As the Wells Fargo Wealth Insurance Specialist in the Pacific Northwest and Mountain Northwest Regions, Erik previously worked primarily with clients of both Wells Fargo Advisors and Wells Fargo's Private Bank to help them achieve their financial goals. Prior to Wells Fargo, Erik worked with advisors and their clients at Merrill Lynch and US Bancorp.

Erik, his wife Amanda, and their three daughters live in Redmond, Washington. In his spare time, he enjoys spending time with his family, the occasional round of golf, and attending University of Washington football games.

Certifications & Education

- University of Washington, Seattle, WA - Bachelor of Arts, Economics, 1994