

Nick Westmoreland

Partner/ Vice President of Business Development



INTRO

Nick desires to serve financial advisors and employers in Georgia by using his experience in the retirement plan industry to help them accomplish their goals.

Nick has over 10 years of experience in customizing qualified retirement plans for small to medium sized businesses. Nick's passion lies in getting to know his clients, their culture and their retirement plan goals.

Nick then relies on his experience and expertise to maximize tax savings for business owners while creating retirement benefits that help his clients recruit and retain top talent. Each client is unique in their needs and it is this challenge that drives Nick to be the best for his clients.

Through ERISA Services, Nick serves approximately 1,000 employers and works with over 400 financial professionals to complement their services in helping our clients achieve their retirement goals. Nick's main goal is to grow and develop the Georgia market.

The team at **ERISA Services** is dedicated to the success and well-being of your retirement plan. Through your relationship with our consultants and relationship managers, we will work with you to understand your company, your employees and your employee benefit plan's objectives. We will tailor fit a design for you to achieve these goals as each client has different objectives for their retirement plan.

ABOUT NICK:

- Nick, his wife and little girl live outside of Atlanta and are all Georgia natives. Nick went to Parkview High School and graduated from Georgia State University
- Nick loves spending time with his family, staying up to date with everything Georgia Bulldogs football and playing golf with friends and clients.

FOCUS:

- To build relationships with financial professionals, and local CPAs, partnering to identify the best retirement plan solutions for their clients.
- To increase awareness of ERISA Services' offerings and solutions, and to be a resource for clients, advisors, and CPAs providing strategies which are the best fit to their needs.
- To be consistent in his results driven approach and message of reliability, honesty, and enthusiasm with the people he serves.

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"Whatever you do, work at it with all your heart, as working for the Lord, not for men."

-Colossians 3:23



ERISA Services, Inc.
Helping You Become Retirement Ready

ERISA Actuarial Services
Enhancing Your Savings