

Taylor Harman

*Regional Director of Sales and Marketing,
Upper MidWest*



INTRO

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

Taylor brings over 8 years of industry experience in retirement plan sales. He considers the most rewarding aspect of his career to be the opportunity to build meaningful relationships, enabling business owners to create successful retirement plans for their employees.

Taylor collaborates with financial advisors, CPAs, and other industry partners to ensure their clients' needs are addressed with confidence. He is committed to helping business owners establish meaningful benefits for their workforce, enabling them to retire with peace of mind. Problem-solving and achieving results are what inspire Taylor each day.

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 TAYLOR:

Taylor and his partner, Molly, reside in Des Moines, IA. When they're not enjoying quality time with their dog, Bandit, they love to explore new restaurants or plan their next global adventure. On weekends, you'll often find Taylor on the golf course with friends or spending cherished moments at the lake with his family.

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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***"The only person you are destined to
become is the person you decide to be."
Ralph Waldo Emerson***

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