



# Erica Tanner

Director of Client Services



Erica has been an essential part of the finance industry since 2007, driven by a passion for building dependable, trusting relationships with clients and assisting them in achieving their goals. After graduating from UCSD with a degree in Biology, Erica explored a career as a chemist but found it unfulfilling. Seeking a change, she started at Citi Smith Barney (now Morgan Stanley), moving on to UBS before being recruited by Art to join Capital Growth, where she feels she has truly found her home.

Erica primarily focuses on client onboarding, client relations, and handling 401(k) and various retirement plan transfers. As an overseer of client service associates and operations, she ensures that all clients receive the highest level of service and seamless ongoing support. Erica relishes solving complicated transfers or account issues, making her clients' lives easier and more convenient.

Erica holds Series 7 and Series 63 certifications, which showcase her expertise and dedication to providing top-notch financial support to her clients.

Born and raised in Modesto, CA, Erica moved to San Diego in 1996 to attend UCSD. After a brief return to Modesto post-graduation, she was drawn back to San Diego, which she is delighted to call home. Married to her husband, Simeon, Erica is the proud mother of three children, Jaden, Asher, and Madelynn. In her spare time, she enjoys volunteering as a soccer coach for the San Diego Soccer Club, traveling, and spending quality time with her friends and family. Erica's role model is her mother, a business owner from a young age who managed to balance work with being present for all of Erica's life events. Now a mother herself, Erica models her approach after her mother, who taught her the importance of a strong work ethic and the possibility of excelling in a career while being a fantastic mom.

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## Professional Licenses and Certifications:

FINRA series 7, 63 and 65