Secure Today

Ready for **Tomorrow**

Echo Wealth Management Team Profile

Meet Erik Nelson, Client Services Associate

At EWM, Erik Nelson is the guy you want in your corner. He's the behind-the-scenes expert ensuring you have everything you need to upload essential documents to the vault, so your financial plan is built on complete, accurate data from the start.

Whether he's helping you set up a new account, organizing documents in perfect order, or managing the moving parts that keep things on track, Erik excels at turning complexity into clarity.

> "Wealth management has many moving parts. I ensure everything runs smoothly so clients can focus on their goals."
>
> Erik Nelson, Client Services Associate

Making the Complex Simple

At EWM, Erik embodies the firm's commitment to clarity, strategy, and results.

He's the person who ensures everything is running like a well-oiled machine so you can focus on what matters most—building a future that's as exciting as it is secure.

From scheduling meetings to handling compliance details, Erik takes pride in managing the behind-the-scenes work that makes achieving your financial goals easier.

But Erik isn't just great at his job because of his skills—he's great because he genuinely cares. Clients describe him as kind, motivated, and always ready to go the extra mile.

He's curious, always learning, and dedicated to finding better ways to serve you. Whether it's helping you get organized or answering your questions (even the ones you didn't think to ask), Erik makes sure you feel supported every step of the way.

From Fortune 500 to Boutique Firm

Erik's path to EWM started at the University of St. Thomas, where he earned a degree in Business Administration with a minor in Spanish.

After graduation, he sharpened his skills managing accounts and client relationships at a Fortune 500 company.

When the opportunity to join EWM came along, Erik jumped at the chance to work on a tight-knit team that's all about personal connection and big-picture thinking.

Beyond Wealth Management

When Erik isn't at EWM, you might find him in the garage working on his latest automotive project. He's a lifelong car enthusiast who loves restoring and fixing vehicles for his friends and family.

This hands-on, problem-solving mindset reflects the way he approaches his work at EWM: focused, detail-oriented, and always with a goal of moving things forward.

A Strategic, Hands-On Approach

Here's the bottom line: Erik Nelson is the kind of person who makes financial planning feel a little less overwhelming and a lot more human.

At EWM, he's not just managing processes—he's helping you take the next step toward the life you've been dreaming about.