NAVIGATION GROUP
Private Wealth Management

Erik S. Davis, CFP®

LPL Registered Principal

erik@navigationgroup.com

When Erik started his career in 1992, he built a practice based on open communication and his desire to make a definable difference in each and every client's life. In his work, Erik most values the relationships that have grown over the years through working in close partnership with his clients. His desire to exceed his clients' expectations drives him to continually strive for excellence as their advisor. "I treat my clients like family and am committed to their goals and values. As an independent advisor, I pride myself on acting as my clients' advocate, working for their best interests."

Erik emphasizes client education and has the ability to communicate complex topics in a straightforward manner. His experience and technical knowledge allow him to effectively coordinate with his clients' attorneys and CPAs in providing seamless and reliable wealth management services. Erik earned his business degree from the University of Colorado with an emphasis in finance. He was certified as a CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®) in 1997, becoming one of the youngest CFP®s in the country at that time, and is a member of the Financial Planning Association. He and his wife Victoria reside in San Francisco and are very active in the Bay Area community, serving on several boards and working with numerous charitable organizations throughout the area. In addition to raising their son Dresden and daughter Vivienne, they both are accomplished performers and enjoy traveling, scuba diving and hiking.