



Erin Wallace
Financial Planning Administrator

Practice and planning administrator of City Securities Wealth Advisors and service specialist to clients; coordinating financial planning, investment account operations and other client services

Erin Wallace is the Financial Planning Administrator of City Securities Wealth Advisors. She is responsible for coordinating the delivery of all services to clients, and supporting the work of other professional staff providing client advice. Clients typically contact Ms. Wallace directly for scheduling appointments, making deposits, withdrawals, requesting statements and tax forms, and similar service needs. She has worked in this capacity from the time Wealth Advisors was established, and provides the highest possible level of service and accuracy.

Ms. Wallace is a graduate of Knox College with a degree in Modern Languages, and is fluent in four languages. She has worked in the financial services industry for over eight years, and holds the FINRA Series 7, 63 and 66 licenses.

City Securities Wealth Advisors specializes in the financial needs of physicians and senior executives. Each client has invested assets ranging from \$500,000 to \$5 million. Potential clients are encouraged to contact us to explore the benefits of working with a dedicated professional advisor. Erin Wallace can be reached directly at 317-808-7126, toll free at 1-800-800-2489 ext. 7126, or via email at ewallace@citysecurities.com.