BIOGRAPHY

Erik S. Hendrickson, ChFC®
Senior Vice President
Managing Wealth Advisor

310.282.3821
ESH1@ntrs.com

"I work with clients to identify planning opportunities and implement comprehensive strategies to meet their personal, financial and charitable objectives."

EXPERIENCE

Erik has nearly 30 years of experience delivering financial planning, tax and estate planning advice. His expertise in investment management, corporate executive planning, income and estate taxation, pre and post transaction planning and advanced wealth transfer strategies is known and respected in the planning community.

Prior to joining Northern Trust, Erik was with J.P. Morgan as an Executive Director and Wealth Strategist and prior to that a Director with Bernstein Global Wealth Management.

EDUCATION

He graduated from the University of Southern California with a B.S. in Business Administration and was a member of the first graduating class of Business Scholars at USC.

CREDENTIALS

Erik has been a featured speaker at national, regional and local events and symposiums including The Hawaii Tax Institute and The Heckerling Institute on Estate Planning. He has published numerous articles and research papers on planning topics and is also a Chartered Financial Consultant (ChFC®)

EXPERTISE

As Managing Wealth Advisor for the Los Angeles region of Northern Trust, Erik leads the Advisory and Wealth Strategies teams. He specializes in the development and implementation of financial, estate and tax plans for high-net-worth individuals, business owners, senior executives and wealthy families.

INTERESTS

Erik and his wife Kelly reside in Redondo Beach, where they enjoy an active lifestyle with their three sons. He enjoys surfing and sailing.

COMMUNITY INVOLVEMENT

Erik is the chair of the board of directors of Partners for Potential. He is also a mentor in the Career Advantage Program at the Marshall School of Business at USC.

3 THINGS PEOPLE ASK ME

- **How should I plan for my legacy & estate tax minimization?**
- **How do I incorporate charitable giving into my overall financial and estate planning?**
- **I know I should diversify my assets, but is this the right time and how do I do it?**

NORTHERN TRUST

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