

ERIC J. VETACK, CPA, CFP®, CRPC®



Business Experience

Eric J. Vetack is a classically trained professional with over two decades of wealth management experience. He is technically competent and proficient, dedicated to improving and maintaining his skill sets for the benefit of his clients and their families.

He started his career working for Arthur Andersen & Co. and later KPMG, providing tax advisory services to their clients. While working with both firms, he gained extensive tax planning experience in the areas of individual, estate and trust taxation. He delivered services to wealthy individuals and their families, corporations and their executives, along with several small business owners and their retirement plans.

As his career progressed, Eric joined Shearson Lehman Brothers, which later became Citigroup Smith Barney, and built his financial planning practice over the next 14 years. Prior to his departure, he was offered the opportunity to become the firms' Southeastern Private Wealth Management Specialist, responsible for assisting other Smith Barney Financial Advisors with the coordination and delivery of Citibank's Private Bank Platform for their High Net Worth clients.

After leaving Citigroup Smith Barney, Eric moved his practice to Merrill Lynch as a Wealth Management Advisor. Having arrived at Merrill Lynch in August, 2007, he continued to build his practice, but he became increasingly aware of his client's desires and needs for truly independent and objective advice. The clients wanted unbiased access to the financial solutions that were right for them, not filtered or pre-selected solutions.

In October of 2009, Eric established WellPoint Wealth & Retirement, LLC, to continue to deliver personalized wealth management solutions for affluent individuals, business owners, professionals, and corporate executives.

Personal

Eric is a graduate of Elon University with a B.S. in accounting. He is a member of the Financial Planning Association (FPA®) and both the American Institute of Certified Public Accountants (AICPA) and the North Carolina Association of Certified Public Accountants (NCACPA). He has served on numerous non-profit boards in Charlotte and is an active volunteer at his church and in his children's schools. He is married and has two children.