

Distinguished Achievement Citation

John (Jeff) F. Erdmann III Class of 1985

With this presentation of Ohio Wesleyan University's Distinguished Achievement Citation, the Ohio Wesleyan Alumni Association Board of Directors is honored to recognize **Jeff Erdmann '85** for his contributions to the field of economics.

Jeff graduated from Ohio Wesleyan in 1985 with a Bachelor of Arts in Economics and Business. He credits his success to his time on the lacrosse field at OWU under Coach Jay Martin, his work in the classroom, and his study abroad experience.

He is currently the managing director of the Merrill Erdmann Group where for the past four years, he has been named Forbes' and Barron's top-ranked wealth adviser in the nation. His team in Greenwich manages approximately \$10.2 billion for over 150 clients.

Jeff's awards include: Forbes' "America's Top Wealth Advisors;" Barron's "America's Top Private Wealth Advisory Teams;" Barron's "America's Top 100 Financial Advisors;" and Barron's "America's Top 1200 Financial Advisors State-by-State. For the past 11 years, Jeff has received the top advisor at Merrill. Jeff was awarded Merrill's David Brady Award in 2017 for his contributions to the community and company. Jeff was also inducted into Research Magazine's Advisor Hall of Fame in 2010.

Jeff's philanthropy efforts were instilled from his time at OWU, when he sat in psychology class during his freshman year. On the board were the words, "Giving is a selfish act." He encourages his clients to include philanthropy as part of their portfolio. Finding his own cause, Jeff has volunteered for over 20 years for Norwalk's Open Door, which is a soup kitchen. He currently serves as their chairman of the board of trustees.

It is with great respect that we present Jeff with the Distinguished Achievement Citation for his service and impressive experience within the field of finance.

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