

## Erik M. Bagley

Financial Advisor  
Financial Representative  
Principal Securities Registered Representative



### *Financial confidence.*

*Clarity • Stability • Longevity • Return*

#### **Request a consultation:**

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Visit my LinkedIn Page! [Erik Bagley](#)

#### **EXPERIENCE**

Erik joined Principal<sup>®</sup> in 2017 with 15 years of previous experience in business and management. He understands the sense of responsibility for managing a business or household and enjoys providing educated guidance, care, and customized tools to partner with people and businesses, who are balancing other demanding priorities, to help protect what is important and build a healthy financial future. Erik wants people to have clarity and confidence about their personal and organizational finances so they can fully enjoy and thrive in their present moments, knowing they have a plan to protect what they work for, understand the path forward, and they have secured an advocate for the journey.

#### **CREDENTIALS & SERVICES**

- Series 7 & Series 66
- California Life and Health 0L86857
- Financial planning
- Investment management services
- Retirement services
- Insurance solutions

#### **PERSONAL**

Erik and his wife Kate currently reside in Folsom, CA where he is active in his community because he believes healthy families and businesses make strong cities. He loves golf and is working toward his goal to play each of the PGA courses in California. Erik also enjoys cycling, great food and wine, exploring new places, and quality time and laughs with family and friends. He dreams of owning a bison ranch with a lodge for family getaways and gathering leaders.