

Biography

The White Oak Group

Pandy L. Martin

Associate Vice President - Investment Officer



Building, managing, and preserving wealth for our clients is the calling of Pandy Martin and the White Oak Group of Wells Fargo Advisors. Being there for our clients through all of life's transitions – planned or unplanned – is our honor and privilege.

Our goals-based investment planning process always begins with and revolves around listening - listening to understand our clients' current situation, their past experiences and their goals for the future. Every client is different and unique. That is why we listen with a sincere and genuine interest, with curiosity and with compassion. With the information our clients share with us, we go to work and develop solutions and strategies to address their comprehensive wealth management needs in the areas of investments, borrowing and liability management, non-portfolio risk management and estate planning and fiduciary services.

While some advisors and clients measure success by technical benchmarks, we measure success by our ability to help clients find joy, happiness and fulfillment in their lives.

That's what Pandy experiences when she is with her son whether they are fishing, hiking or just enjoying their time together. The importance of Pandy's family serves as a constant reminder of what matters most and the impact that her work has on the lives of her clients and their families, now and for years to come.

Together with her colleagues at The White Oak Group of Wells Fargo Advisors, Bill Hardin and Mitzi Maxey, Private Wealth Financial Advisors, believe that helping clients to find joy, contentment, purpose and meaning in their lives is the driving force behind everything they do.

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