



LEADERSHIP PROFILE

Brian Dykstra is a Managing Director with Oxford Financial Group, Ltd. Brian has worked in the financial services industry for more than 15 years helping clients identify and implement investment, family gifting and business succession strategies. He also has extensive experience in providing advisory services to a number of non-profit organizations.

Prior to making the transition to Oxford, Brian was a Vice President for Fifth Third Private Bank where he served as a Wealth Management Advisor for high net worth families.

Prior to Fifth Third Private Bank, Brian was with Morgan Stanley Smith Barney where he served as a Financial Advisor to individual clients in managing their assets and preserving their wealth. He also worked as the Major Gift Officer and the Director of the Hope Fund for Hope College in Holland, Michigan.

A graduate of Hope College, Brian earned a Bachelor's degree in Business Administration. He obtained the CERTIFIED FINANCIAL PLANNER™ designation from the Certified Financial Planning Board after completing the educational

BRIAN W. DYKSTRA, CFP®, CIMA® MANAGING DIRECTOR



"It brings me great pleasure to help families accomplish their objectives through independent, consultative advice."

curriculum at Grand Valley State University and received the Certified Investment Management Analyst® (CIMA®) designation from the Investment Management Consultants Association after completing the educational curriculum at the Wharton School of Business and the University of Pennsylvania.

Brian donates his time and expertise to a number of organizations. He currently serves on the Visser YMCA Board of Directors as a member of the Executive Board Team and as Chair of the Resource and Development Committee. He is the Vice President of Starfysh, a non-profit focused on reinvigorating a Haitian island as well as a member of the Camp Geneva Development Committee. Brian also serves as the Director of Estate Giving and is a Cabinet Member of the 'Renewing Today, Building Tomorrow' capital campaign for the First Reformed Church of Grandville, Michigan.

He and his wife have three young boys and his family enjoys spending time outdoors in Western Michigan and rooting for the Chicago Cubs.

CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals are licensed by the CFP® Board to use the CFP® mark. CFP® certification requirements include: bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP® Board (www.cfp.net), successful completion of the CFP® Certification Exam, comprised of two three-hour sessions, experience requirement: 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements, successfully pass the Candidate Fitness Standards and background check, agree annually to be bound by CFP® Board's Standards of Professional Conduct and complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and Standards of Professional Conduct. The Certified Investment Management Analyst® (CIMA®) designation awarded by the Investments and Wealth Institute demonstrates certification in portfolio construction, focusing on asset allocation, due diligence, risk measurement, investment policy and performance measurement. Candidates for the program must complete an executive education program through an approved education provider and successfully complete the certification exam. CIMA designees are required to complete 40 hours of continuing education every two years.

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