LEADERSHIP PROFILE

EILEEN M. MCCAULAY, J.D., CTFA

SENIOR FIDUCIARY OFFICER, THE TRUST COMPANY OF OXFORD™

"My goal is to assist families in achieving their vision for the future, providing for protection as well as growth in their estates. Wealth creates freedom with responsibilities. We aspire to enhance the former for our clients while we, as Trustee, tame the latter."

Eileen McCaulay is a Senior Fiduciary Officer with The Trust Company of Oxford. Eileen has more than 12 years of experience with private client services, having previously administered personal trusts and private foundations for large banks. She currently serves as a member of the Trust Investment Policy and Strategy Committee.

Eileen's role is to draw upon the resources of Oxford Financial Group, Ltd. to help trust clients achieve their financial goals within the framework of their trust document. Her close consultation with each Oxford Managing Director, along with her ongoing relationships with attorneys and accountants, allows Eileen to utilize Oxford's comprehensive wealth management team to benefit The Trust Company of Oxford's clients. Eileen is committed to Oxford's tradition of providing the best possible service to the firm's family of clients.

After completing her undergraduate studies at The College of Mount St. Joseph in Cincinnati, Eileen pursued her J.D. at the Salmon P. Chase College of Law of Northern Kentucky University and is admitted to the practice of law in Ohio.

Eileen earned her Certified Trust and Financial Advisor (CTFA) designation in 2007.

The Juris Doctor (J.D.) is a graduate degree in law. The Certified Trust and Financial Advisor (CTFA) designation is awarded by the ABA Institute of Certified Bankers who demonstrate their knowledge as a trust and financial advisor. Candidates must meet one of the three following requirements to be eligible: three years of wealth management experience plus ICB-approved training, five years of personal trust experience and a bachelor's degree or 10 years of personal trust experience. Candidates are required to successfully complete a final certification examination. Candidates must complete 45 credits every three years (with a minimum of six hours in each of four knowledge areas) of continuing education. OFG-2011-15