OXFORD

FINANCIAL GROUP, LTD™

Family Office Services

A 21st-Century Approach to a 19th-Century Idea

THE HISTORY OF THE FAMILY OFFICE

More than a hundred years ago, wealthy families, such as the Carnegies and Rockefellers, established private financial offices to manage their family wealth. These offices began to open their doors to other private clients during the 20th century and became known as "multi-family offices."

The clientele of Oxford Financial Group, Ltd., has been diverse from the start. We work with business owners and operators, with farmers and manufacturers, with doctors and lawyers, with other professionals—and with the families and heirs of these people.

OUR COMMITMENT TO YOUR LIFE AND YOUR LEGACY

The sole commitment of our Family Office Services group is to enhance the financial lives of our clients and to enrich their family legacies. This means helping you to organize and deploy your wealth in ways that enable you and your family to lead lives that are happier, more harmonious and more secure.

NO TWO CLIENTS ARE QUITE THE SAME

Although many clients have similar needs, we find that each one defines his or her goals somewhat differently. For some, investment performance is at the top of the list. For others, the goal is to use their resources to support a life that's satisfying, often in philanthropic terms, as well. There are also many who are primarily concerned with building a lasting family legacy.

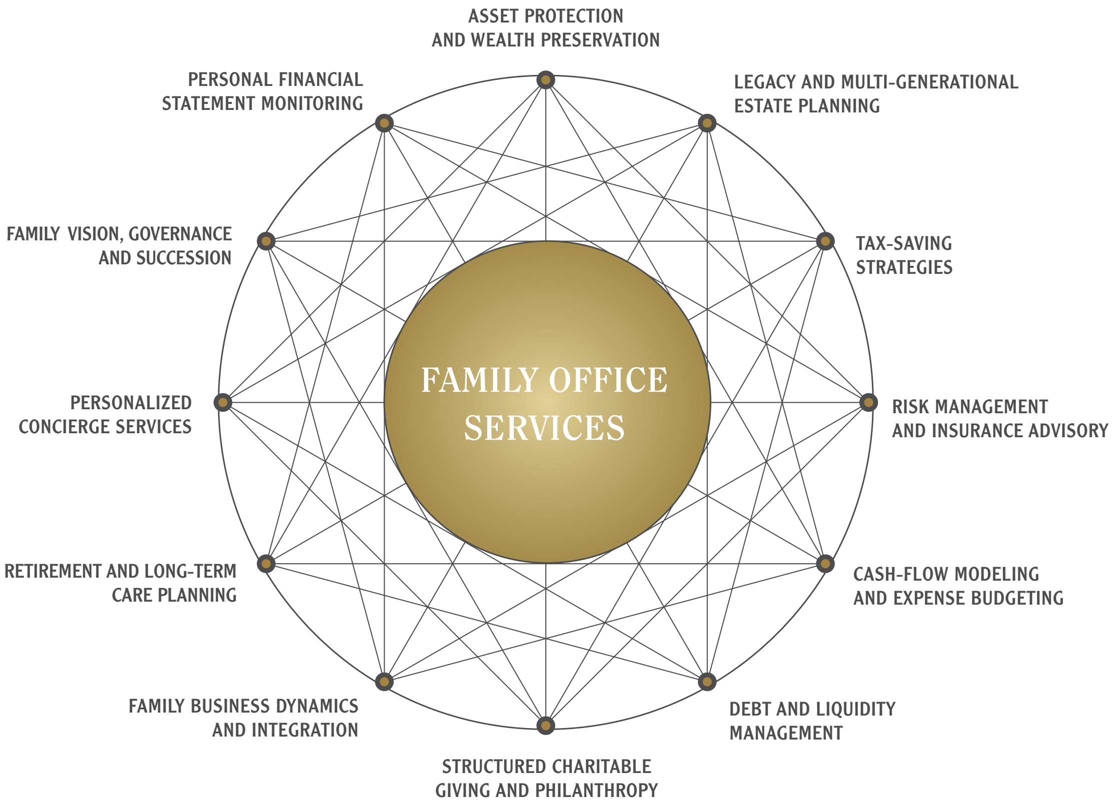
The first step in our highly tailored approach is to conduct an in-depth review of your current financial landscape, including assets and liabilities, estate documents and insurance, as well as issues and commitments. Based on this, and our years of experience, we develop a financial master plan. Actually, it's more than a plan—it becomes a shared vision for you and your family, with short-term and long-term goals, strategies and recommendations.

"We caution clients to not focus too much on either a short-term gain or a short-term loss. The important thing is to make steady progress toward your long-term goals, while managing expenses all along the way."

A TEAM APPROACH

Today's financial landscape is far more complicated than it was just ten years ago. It's far more volatile, as well. In this environment, a multidisciplinary, team approach is absolutely essential.

Your Oxford partner is like a conductor. His or her job is to orchestrate the work of specialists in diverse areas such as taxation and insurance, estate planning, philanthropy and asset protection. Your partner coordinates the work of the team, monitors the results, interprets the reports in a thoughtful manner and works with you to bring your plan to life.



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