LEADERSHIP PROFILE

J.P. SIMMONS

CHIEF PRACTICE DEVELOPMENT OFFICER

"I believe that excellence in the art of advice can only be achieved when we apply our best intelligence, ethics and personal care consistently throughout the key events and continual journey of those who partner with us. Our real value to our clients can be found in the superior quality of our solutions and our commitment to challenge ourselves on that measure."

J.P. Simmons is Chief Practice Development Officer at Oxford Financial Group, Ltd. In this capacity, J.P. works with our Managing Directors helping them in the management of their practice and to ensure the firm provides an Oxford quality experience.

J.P. has more than 24 years of experience in the investment industry with a unique mixture of capabilities. He has served as a consultant to Registered Investment Advisor (RIA) firms and also directly with business owners and ultra-high net worth individuals providing planning and investment advice. His professional background includes owning his own RIA, working as a vice president with Neuberger Berman and functioning as a director for a Texas based multi-family office.

Prior to joining Oxford, J.P. served as Managing Director for Business Consulting with Charles Schwab Advisor Services™, where he and his team executed practice management consulting initiatives with RIA's across the country.

J.P. has a Bachelor's degree from Indiana University. He frequently speaks on numerous topics including RIA practice management, business succession and the nature of new wealth in the marketplace at numerous professional organizations, educational groups and societies across the country.

J.P. lives in Carmel with his wife Sherry and their daughters Madison and Mia. He enjoys spending time with family, outdoor sports and scuba diving.