LEADERSHIP PROFILE

JEFFREY H. THOMASSON, MBA, CFP®

CHIEF EXECUTIVE OFFICER & MANAGING DIRECTOR

"I sincerely appreciate the fact that our clients expect and demand value for their money—and they're absolutely correct in doing so. The keystone of our firm is to provide quality, objective solutions to our clients in a consistent and thoughtful manner. This is not only our professional approach—it's my personal commitment."

Jeff Thomasson is the CEO and a Managing Director of Oxford Financial Group, Ltd., which he founded in 1981 upon receiving his MBA from the Indiana University Graduate Business School.

Jeff's primary focus is the continued success of Oxford. His time and expertise are devoted to the coordination and overall strategic direction of Oxford, and serving individual family clients toward achievement of their comprehensive financial and investment planning goals through tailored solutions.

Jeff is a member of the YPO Gold and Chief Executives Organization and serves on the board of POLYWOOD® and numerous family foundations. Previously, he served on the boards of Ontario Systems, Parkway Company, Pay Link Payment Plans of Chicago, Illinois, Leadership Network of Dallas, Texas, Union Federal Bank, Indiana Bancshares, Waterfield Mortgage Corporation, Flight Options, Syndicate Systems, The Hudson Institute, Park Tudor School, Indiana Repertory Theatre and the Indianapolis Symphony Orchestra.

Involved in numerous private foundations, Jeff thoroughly enjoys philanthropy. Through the Thomasson Foundation, he and his family have awarded hundreds of scholarships to deserving college students over the last several years. Jeff provides two annual scholarships to graduating Zionsville High School seniors in honor of Lloyd and Jane Taylor, as well as the Oliver L. Warner Educational Scholarship he provides through the Boone County Community Foundation.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. 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. OFG-2006-3