LEADERSHIP PROFILE

JAMES WRIGHT, CFP®, CMFC®

SENIOR CLIENT RELATIONSHIP MANAGER

"At Oxford, our client's best interest is at the heart of what we do every day. My passion is to work closely with our clients and the rest of the Oxford team to ensure that our client's best interest is always top of mind. This focus shapes both the actions that we take daily and the overall service we provide."

James Wright is a Senior Client Relationship Manager at Oxford Financial Group, Ltd. His primary responsibility is to act as a liaison to his clients, ensuring a smooth and timely coordination of the many unique and varied services provided to Oxford clients. He also works with Oxford's Managing Directors in reviewing and implementing recommended financial planning and investment strategies.

Before joining Oxford in November 2014, James was a financial planner for a fee-only financial planning and investment management firm where he worked closely with high net worth clients in all aspects of financial planning and wealth management.

James has 13 years of financial services experience. He holds a CERTIFIED FINANCIAL PLANNER™ designation as well as a Chartered Mutual Fund Counselor (CMFC®) designation.

James earned a Bachelor of Science degree in Finance with a concentration in Financial Planning and minor in Insurance from Ball State University.

James and his wife live in north Indianapolis with their two sons. They enjoy sports, spending time with family and being outdoors.

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 Chartered Mutual Fund Counselor® (CMFC®) is awarded by the College for Financial Planning to professional mutual fund advisers who complete a self-study course followed by a final examination. The designation requires 16 hours of continuing education every two years. OFG-2011-24