OXFORD FINANCIAL GROUP, LTD.™

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 has held the FINRA Series 7, Series 66, Series 26 and Life, Accident and Health Insurance licenses.

James earned a Bachelor of Science degree in Finance with a concentration in Financial Planning and minor in Insurance from Ball State University. He holds a Certified Financial Planner™ designation as well as a Chartered Mutual Fund Counselor (CMFC®) designation.

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