



LEADERSHIP PROFILE

KAREN H. MERSEREAU, CPA/PFS, CFP®, CIMA®

MANAGING DIRECTOR



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“Investments should never be managed in a vacuum, but rather, coordinated with an individual’s or institution’s financial objectives and legacy goals. Coordinated efforts, incorporating all elements of wealth planning, are the best avenue for successfully achieving financial goals.”

Karen Mersereau is a Managing Director with Oxford Financial Group, Ltd. In her role, Karen works closely with families to develop optimal financial, investment, tax and estate planning strategies. Through these strategies, she assists clients in reaching their financial goals and preserving family wealth. Karen’s background also lends itself well to addressing the needs of Oxford’s institutional clients, including endowments, foundations and other tax-exempt pools of assets.

Before joining Oxford in 2010, Karen was a managing director of KSM Capital Advisors, a registered investment advisor, and a partner with Katz, Sapper & Miller specializing in wealth planning for high net worth clients. Karen has significant experience working with owners of closely-held businesses incorporating strategic pre-exit planning to transfer wealth and enhance their desired legacy. She enjoys working with business owners both pre- and post-sale to bring value at all stages of their business succession planning.

Karen has a Bachelor’s degree in Accounting from Indiana University and a Master’s degree in Taxation from Pace University in New York. She holds the designation of Certified Public Accountant (CPA) and Personal Financial Specialist (PFS) from the American Institute of Certified Public Accountants, of which she is a member. She is also a member of the Indiana CPA Society (INCPAS), is a Certified Financial Planner™ professional and holds the Certified Investment Management Analyst (CIMA®) designation from the Investment Management Consultants Association.

Karen’s financial acumen is also tapped in community service work. She is currently serving on the board of directors of the Indianapolis Symphony Orchestra and has previously served as treasurer. In the past, she has been a member of the Riley Children’s Foundation Women’s Network Advisory Group and served as a member and treasurer of the Board of Governors of the Richard G. Lugar Excellence in Public Service Series.