



OXFORD FINANCIAL GROUP, LTD.™

## LEADERSHIP PROFILE

### LORELEI M. TOLSON, CPA/PFS, CFP®, CIMA®, CEPA, CEXP™

MANAGING DIRECTOR



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*“I believe the most important aspect of the client-financial advisor relationship is trust. Trust is earned by delivering impeccable client service year after year; by honoring client confidentiality; by being respectful, honest and responsive; by being proactive and engaging clients with new and fresh ideas; and by continually striving to exceed expectations.”*

Lorelei M. Tolson is a Managing Director at Oxford Financial Group, Ltd. In addition to serving clients and developing new business, Lorelei heads up Swindon Transition Counsel—a service for business owners who seek an orderly, financially sound and tax efficient transition of the ownership, management and/or control of their business. As evidence of her expertise in working with business owners, Lorelei holds two of the most highly respected credentials in exit planning—the Certified Exit Planning Advisor (CEPA) and the Certified Exit Planner (CEXP™) designations. She also assists high net worth families with financial and investment solutions.

Prior to joining Oxford in 2007, Lorelei served as Senior Manager in the Personal Financial Services Group of Ernst & Young, LLP’s Tax Department. In this role, she assisted business owners and high net worth individuals and families with tax and financial planning.

Lorelei has a Bachelor of Science degree from Butler University, where she graduated cum laude with high honors in Accounting.

Other designations Lorelei holds include Personal Financial Specialist (PFS), Certified Financial Planner™ and Certified Investment Management Analyst (CIMA®). She graduated with honors from the Cannon Financial Institute’s Trust Tax School held at the University of Notre Dame. In addition, she successfully completed the Certified Investment Management Analyst program sponsored by Investment Management Consultants Association (IMCA) taught in conjunction with The Wharton School, University of Pennsylvania. She has also authored numerous articles on tax and financial planning topics.

Lorelei is the founder and current president of the Exit Planning Institute Central Indiana Chapter. She is currently a member of the Cornerstone Council for the Central Indiana Community Foundation, Certified Exit Planning Institute, Business Enterprise Institute, American Institute of Certified Public Accountants, Indiana CPA Society and Investment Management Consultants Association.