LEADERSHIP PROFILE

Stephanie Allsopp Van Vlerah is a Managing Director with Oxford Financial Group, Ltd. and is a member of Oxford's Value Council Committee. She has dedicated her entire career to working with and advising owners of privately held businesses and their families. Prior to joining Oxford in 2013, Stephanie was a Vice President and Private Banker with J.P. Morgan where she led a team of specialists in advising high net worth clients, primarily on investments, banking, credit and trust and estate planning.

Prior to joining J.P. Morgan, Stephanie was a Vice President and Relationship Manager in the Commercial Bank of Banco Popular North America. While there, she excelled at developing and managing a diverse portfolio of complex commercial clients, as well as structured and negotiated financing transactions to meet the needs of clients, prospects and the institution.

Stephanie earned a Master's degree in Business Administration from the Kellogg School of Management at Northwestern University and a Bachelor's Degree from DePaul University with a major in Finance and a minor in Accounting, graduating with high honors.

STEPHANIE ALLSOPP VAN VLERAH, MBA, CFP®

MANAGING DIRECTOR

"As an advisor, I believe the most important asset we have is our relationship with our clients. Building strong relationships requires that we earn their trust and confidence by being responsive, honest and accountable. I am committed to providing the thoughtful, independent advice and reliable, personalized service that our clients deserve."

Stephanie currently serves on the Rosecrance Foundation Chicago Board of Directors. She also serves on the Board of Directors of Facing Forward to End Homelessness. She previously served on the Advisory Council of Concern Worldwide, U.S. and remains an active supporter of the organization. For six years she served as a member of the Board of Trustees of the Norwegian American Hospital Foundation, including as a member of the executive committee. Additionally, Stephanie is a member of the Kellogg Alumni Club of Chicago, a member of the Chicago Estate Planning Council and a mentor and volunteer with the DePaul University Alumni Sharing Knowledge Program, where she mentors current students and helps them navigate their career and future aspirations.

A Michigan native, Stephanie and her family live in Chicago.

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-2006-22