



## LEADERSHIP PROFILE

### STEPHANIE ALLSOPP VAN VLERAH, MBA, CFP®

MANAGING DIRECTOR



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*“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 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. She previously held both the Series 7 and 63 licenses.

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.