



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Tim Wittenbrook is a Managing Director with Oxford Financial Group, Ltd. Prior to joining Oxford, Tim was an Executive Director at JPMorgan Asset Management and a Vice President of Fidelity Investments.

Tim has worked in the financial services industry for more than 30 years, advising families and institutions on asset allocation, investment manager selection and fiduciary risk management. His expertise also extends to corporate retirement plans, helping companies with investment menu selection, ongoing investment monitoring and plan design to help meet fiduciary requirements. In addition to being a member of Oxford's Retirement Plan Committee, he is an active CERTIFIED FINANCIAL PLANNER™ professional

TIM E. WITTENBROOK, CFP® MANAGING DIRECTOR



"Oxford's clients receive the ultimate benefit from our commitment to independence and objectivity: a true partner that is working, 100 percent of the time, only in their best interests.

This is a perfect combination with my own passion and focus to first reach a deep understanding of what really matters to my clients and then to continually deliver the very best ways to achieve those goals."

and a member of the Investments and Wealth Institute.

Tim is a native of the Cincinnati area and resides with his wife, Michelle, in Montgomery. They have five children and have been involved in a diverse group of charitable organizations. They are particularly interested in efforts that benefit children.

Tim graduated from Miami University with a Bachelor's degree in Finance. He is a member of Cincinnati USA Regional Chamber, the Goering Center, the Cincinnati Association for Corporate Growth, Queen City Club and Kenwood Country Club.

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-2006-23