



## LEADERSHIP PROFILE

Debbie has served in Oxford Financial Group, Ltd.'s Family Office Services group for over 30 years. In her role as a Senior Wealth Planner, Debbie creates comprehensive financial plans covering retirement and cash flow planning, Monte Carlo modeling, college funding, life insurance, property and casualty insurance and estate planning. She also performs trust and retirement account distribution calculations, addresses Social Security and Medicare issues and researches and writes articles spanning a broad array of financial planning issues.

Debbie received a Bachelor of Science degree in Forensic Studies from Indiana University but soon changed her career

### DEBBIE MARTZ, CFP® SENIOR WEALTH PLANNER



*"My ability to help provide harmony between estate, retirement, investment, income tax, cash flow and insurance planning is key in serving our clients in the most effective way possible."*

path to financial services, working in the reconciliations department of a bank. While there, she played an instrumental part in the bank's transformation to more sophisticated computer systems. Upon joining Oxford in 1985, Debbie played a similar key role in upgrading the firm's systems. She obtained her CERTIFIED FINANCIAL PLANNER™ certification in 1990 to support her role of creating projections, illustrations and recommendations to cover all areas of a client's financial life.

Debbie is a long-time Carmel resident. She enjoys spending time with her son and extended family members and friends, as well as music, long walks with her two rescue dogs and gardening.

*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](http://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-2011-10*