LEADERSHIP PROFILE

SUSAN HAGLEY, MST

WEALTH STRATEGIST

“Wealth planning is a uniquely personal endeavor. I enjoy the opportunity to provide clarity and simplification around a client’s planning, so they fully understand the impact on their family and long-term goals.”

Susan Hagley is a Wealth Strategist for Oxford Financial Group, Ltd. In this role, Susan’s primary focus is to review and illustrate clients’ estate plans and develop strategies to help them accomplish their goals. She also models cash flow for retirement, education savings and estate planning.

Prior to joining Oxford, Susan was a Wealth Planner for Mirador, a multi-family office that was a division of Fifth Third Bank. In this role, she served as a technical resource and assisted in the creation of multi-generational wealth plans and wealth strategy illustrations.

Susan also spent a decade in public accounting concentrated on the taxation of high net worth individuals, private foundations and family partnerships.

Susan earned a Bachelor of Science degree in Accounting and a Master of Science in Taxation degree from Grand Valley State University.

Susan is a Grand Rapids native. She has two children and enjoys spending time with family and being active outdoors.