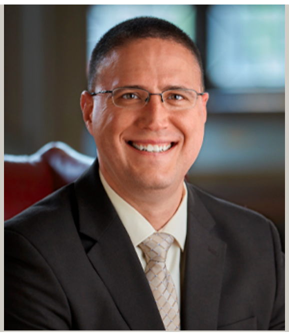
OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

JEREMY L. MERTENS, J.D., CPA

SENIOR WEALTH STRATEGIST AND FAMILY OFFICE FELLOW



"I look at each day as an opportunity to learn something new, because I know that the knowledge I obtain today will benefit my clients in the future."

As a Senior Wealth Strategist and Family Office Fellow at Oxford Financial Group, Ltd., Jeremy serves as a technical resource for Family Office Services. He brings almost 15 years of experience working with high net worth individuals and advisors to develop efficient tax and estate planning strategies to meet client's goals.

Prior to joining Oxford, Jeremy served as Tax Managing Director, Private Client Services, at BDO's National Tax Office. In this role, he researched complex income and transfer tax issues related to planning for high net worth individuals. He also assisted with structuring estate plans to meet client goals in a tax efficient way. In addition, Jeremy reviewed complex individual, trust, gift and estate tax returns.

Jeremy received his Juris Doctorate from Albany Law School and his Bachelor of Science degree in Business Administration and Accounting from Baker College. He is a Certified Public Accountant.

Jeremy lives with his wife and three children in Grand Rapids, Michigan. He enjoys spending time with his family, cooking and catching the occasional game on television.

The Juris Doctor (J.D.) is a graduate degree in the study of law. The Certified Public Accountant (CPA) is the statutory title of qualified public accountants in the US who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements. Certification is administered by each state. OFG-2010-06