



FINANCIAL GROUP, LTD™

M25 Counsel



# For the Bigger Picture, and the Next Generations

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## M25 COUNSEL

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The M25 motorway is the 117-mile beltway that encircles Greater London. Oxford Financial Group, Ltd.'s M25 Counsel draws a similar circle around all of your family's multi-generational assets, no matter where they're invested, and helps you develop and implement a road map for long-term estate and financial planning.

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## IT'S IMPORTANT TO LOOK AT THE BIGGER PICTURE

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If you're like most of our clients, you have family assets in a variety of places, including banks, brokerage accounts, trusts, life insurance and annuities, private placements and limited partnerships. The problem is that it's difficult

to get a clear view of the big picture. Which elements are performing well and which are not? Which assets are destined for which generations? Where are the gaps and overlaps in your multi-generational financial plan?



*“Each month my client used to get seven different statements and reports, but had only a vague idea of how they all fit together. Now he can see the bigger picture, and the longer term.”*





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## AN INTEGRATED VIEW

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With M25 Counsel, we look beyond the assets Oxford is charged with supervising to build an integrated view of your entire, multi-generational asset portfolio. A comprehensive, quarterly report

shows you what you have and where it is, and monitors how each element is performing as well as what it's costing you in fees and expenses. All the dots are connected.

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## ANALYSIS AND INSIGHTS

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Armed with this detailed information, we analyze your holdings, both individually and in total, and offer insights as to what could be improved. You may lack diversification or have too much invested in a risky or expensive asset.

You might be able to better manage future estate taxes by transferring some holdings, or by taking advantage of generation-skipping trusts. You may be paying too much in administrative expenses or fees, or getting too little service.

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## COUNSEL AND CONTROL

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Our counsel gives you greater control. With our help, you can now integrate your estate-planning goals with your investment goals and coordinate tax efficiencies between generations. Without changing advisors, you can replace high-cost

investments with similar vehicles that are more efficient. And, when a market opportunity—or crisis—arises, you can implement changes rapidly and in a coherent manner. No traffic jams.



*“Because of the insights provided by M25 Counsel,  
our clients are in a better position to work with  
the providers who handle their other assets. Now,  
they don’t just go to those meetings to listen.  
They go with an agenda.”*

