



LEADERSHIP PROFILE

CHARLES R. CARTER

MANAGING DIRECTOR



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“I find great joy listening to clients’ needs and helping disentangle a complex web of goals and dreams through Oxford’s combination of outcome-based investing objectives and the seamless integration with legacy planning goals. Delivering this clarity and peace of mind to families is my ultimate passion.”

Charles Carter is a Managing Director with Oxford Financial Group, Ltd. His primary responsibilities include utilizing the expertise within Oxford’s Family Office Services team to enhance the financial lives and enrich the legacy of high net worth and ultra-high net worth families. He uses his expertise in multi-generational wealth planning, along with his dedication to superior client service, to educate and guide families in the creation and continuous execution of a thoughtfully crafted family wealth MasterPlan.

Charles brings to Oxford more than 15 years of experience in comprehensive private wealth solutions for families of significant worth. Prior to joining the firm, he was a top performer and Vice President for Highland Capital Brokerage, partnering with top investment and insurance professionals to advise clients on complex estate planning, trust and risk strategies. Working directly with families and their advisors, Charles specialized

in providing unbiased counsel on the execution of financial advice. Prior to Highland, Charles had executive level experience with Wells Fargo where he led families through detailed financial planning, including credit management. He also worked with business owners on succession planning and risk mitigation with Federated Mutual Insurance.

Charles earned his Bachelor of Business Administration in Finance from the University of Kentucky, along with an International Business minor. He currently holds the Series 65 license and previously held both the Series 6 and 63 licenses, as well as life, health and property and casualty licenses.

Though originally from Ohio, Charles and his wife, Cari, now live in the Indianapolis area with their young daughter. In his free time, Charles is an avid golfer and enjoys being active in the community.