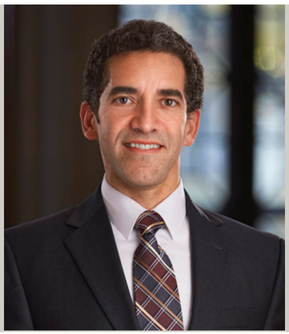
LEADERSHIP PROFILE

DAVID LEWIS, CFA, CAIA

MANAGING DIRECTOR & OXFORD INVESTMENT FELLOW



"Successful investment research requires a comprehensive assessment of qualitative and quantitative information specific to the manager, alongside an understanding of the current market environment. Our deep professional experience, integrated with a thorough and well-resourced effort, allows us to identify best-in-class strategies for client portfolios."

David Lewis is a Managing Director and Oxford Investment Fellow with Oxford Financial Group, Ltd. In this role he is responsible for sourcing and researching private market opportunities.

Before joining Oxford, David led alternative investment research for William Blair's private wealth management business. David focused on real estate, natural resources, private equity and hedge funds. He was responsible for the full life-cycle of each investment including sourcing, conducting rigorous due diligence, educating investors and the ongoing monitoring of each opportunity. His other professional experience includes private market and specialty finance research for a multi-family investment office, and recommending investment strategies and asset allocation to the board of directors at Rotary International and the Rotary Foundation.

David graduated from the University of Wisconsin with a Bachelor of Science degree in Economics with Mathematical emphasis. He is a holder of the Chartered Financial Analyst® designation (CFA® charterholder) and was awarded the Chartered Alternative Investment Analyst (CAIA) designation in 2010. David is a member of the CFA Society of Chicago.

David and his wife live in Evanston with their two children. David enjoys golf, theatre and spending time with his family.