



OXFORD FINANCIAL GROUP, LTD.™

## LEADERSHIP PROFILE

### LORA L. WHITE

FIDUCIARY OFFICER, THE TRUST COMPANY OF OXFORD™



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*“Excellent client service on all levels has been the most important Oxford differentiator. At The Trust Company of Oxford, we focus on asset protection and growth to help achieve our clients’ goals.”*

Lora White is a Fiduciary Officer with The Trust Company of Oxford. She has been an Oxford Financial Group, Ltd. associate in various roles for almost 30 years, enabling her to truly understand how each Oxford team plays a critical role in providing excellent client service to help clients achieve their goals.

Lora draws upon her deep knowledge of Oxford’s trust clients to help them achieve their financial goals within the framework of their trust document. She achieves this by working closely with the Oxford Managing Directors, outside attorneys and accountants.

Prior to her current role, Lora was a technical advisor for Oxford’s Family Office Services. In this capacity, she acted as a liaison to her clients to ensure the seamless coordination of

Oxford’s many unique services. Lora also created client deliverables as a client service specialist and as part of Oxford’s quarterly investment monitoring report team. Prior to that she served as an executive assistant to the CEO.

Lora completed her formal education at Rochester High School in Rochester, Indiana. She has completed all three courses in the Cannon Personal Trust Curriculum at the Cannon Financial Institute.

In addition to being an active member in her local church, Lora volunteers for Dress for Success and is the financial liaison for Find Your ‘A’ Game, an organization that helps young girls find themselves through Christianity.