



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

PETER N. REIST, CPA/PFS, AIF®

MANAGING DIRECTOR



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“The highest compliment one can receive is a referral from a satisfied client. As I have a fiduciary obligation to work for my client’s best interests, my goal is to be their trusted advisor.”

Peter Reist is a Managing Director with Oxford Financial Group, Ltd. In his role, Peter provides personal financial planning and private office services to executives and high net worth families. By using his financial, tax and estate expertise, he focuses on each client to individualize a plan to meet specific goals within their risk tolerance. Peter’s background also lends itself well to addressing the needs of Oxford’s institutional clients, including endowments, foundations and other tax-exempt pools of assets. He also applies his financial acumen as a frequent presenter of financial planning seminars to executives, entrepreneurs and employee groups.

Prior to joining Oxford, Peter was a managing director with KSM Capital Advisors, LLC, a registered investment advisor. There, he worked closely with clients on a variety of income and estate planning matters.

Peter was also a tax partner at Katz, Sapper & Miller, where he had been employed since 1988. Prior to that, he was a public accountant with Price Waterhouse.

His years of experience in federal, state and real estate taxation involving individuals, S-corporations and partnerships allow him to draw on that expertise for his clients’ benefit.

A graduate of Manchester College, Peter holds a Bachelor of Science degree in Accounting and is a Certified Public Accountant (CPA), Personal Financial Specialist (PFS) and an Accredited Investment Fiduciary (AIF®). He is a member of the American Institute of Certified Public Accountants (AICPA), the Indiana CPA Society (INCPAS), and Fi360.

Peter is a board member of the Carmel Clay Public Library, the Indiana Repertory Theatre and St. Mark’s United Methodist Church Finance Committee. In addition, he is a member of the Professional Advisor Leadership Council for the Central Indiana Community Foundation and has been active with the American Cancer Society for over twenty years.