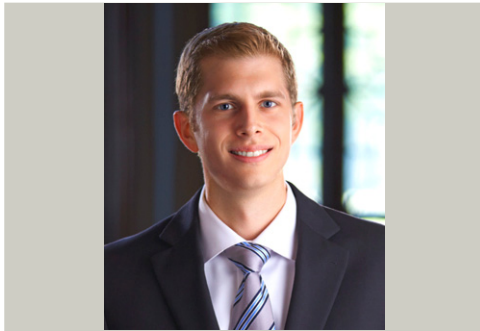




LEADERSHIP PROFILE

BRET HORSFIELD, CFP®

CLIENT RELATIONSHIP MANAGER



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“I am committed to excellence and relevance in my work because clients deserve to have someone who is constantly learning and adding value to their financial well-being.”

Bret Horsfield is a Client Relationship Manager at Oxford Financial Group, Ltd. In this role, he partners with Managing Directors in the development of strategies in all areas of personal financial planning and investment related activities. Bret acts as a liaison to ensure the coordination of services and implementation of the financial needs of Oxford’s clients.

Bret originally joined Oxford in 2016 as a Family Office Specialist where he assisted in the development and analysis of fundamental financial documents for Oxford’s clients. He also collaborated in the research and preparation of relevant topics for client education materials, key client deliverables and comprehensive financial plans.

Prior to joining Oxford, Bret worked at JPMorgan Chase as a Branch Manager, where he managed a team of seven employees and helped grow the branch to nearly \$100 million in deposits and investments.

Bret attended the University of Louisville’s College of Business, where he graduated summa cum laude with a Bachelor of Science degree in Business Administration.

Bret grew up in Noblesville and currently lives in Indianapolis with his wife Megan and their two dogs. He enjoys playing golf with his family and cheering for his hometown teams, the Colts and the Pacers.