LEADERSHIP PROFILE

Cason Cusack is a Client Relationship Manager with Oxford Financial Group, Ltd. Cason uses his extensive experience in all aspects of financial planning to help clients meet their financial planning needs and implement their investment strategies.

Prior to joining Oxford, Cason was a Portfolio Consultant at Schwab Private Client Investment Advisory where he served as the daily point of contact for clients on holistic wealth management inquiries.

Cason graduated from Brigham Young University with a Bachelor's degree in Global Studies. He is a CERTIFIED FINANCIAL PLANNER™ professional.

Cason is active in the community, serving as a volunteer at the International Center of Indianapolis and the Butler Tarkington Neighborhood Association. He also serves on the board for the Fairview Early Childhood Program. Cason became fluent in Spanish after volunteering and living full-time for two years in Argentina.

Cason and his wife Kaela live in Indianapolis with their young children. Cason enjoys scuba diving and domestic and international travel.

CASON M. CUSACK, CFP®
CLIENT RELATIONSHIP MANAGER

"I am passionate about building deep, personal relationships with clients. That understanding of client objectives enables me to strategically and proactively address their complex needs every day."

Certified Financial Planner™ (CFP®) professionals are licensed by the CFP® Board to use the CFP® mark. CFP® certification requirements include: bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP® Board (www.cfp.net), successful completion of the CFP® Certification Exam, comprised of two three-hour sessions, experience requirement: 6,000 hours of professional experience related to the financial planning process or 4,000 hours of apprenticeship experience that meets additional requirements, successfully pass the Candidate Fitness Standards and background check, agree annually to be bound by CFP® Board's Standards of Professional Conduct and complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and Standards of Professional Conduct. OFG-2011-8