



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Debbi Bennett is a Managing Director at Oxford Financial Group, Ltd. with over 35 years of experience in financial planning, banking, trust and investment strategies. Her excellence in client service, sound and objective professional advice and strict attention to detail have earned her respect and recognition within the Midwest's financial and investment community.

Debbi dedicates her time to the Family Office Services of Oxford, providing multi-generational counsel to family clients. In 1997, she orchestrated the creation of The Trust Company of Oxford™.

Debbi is a graduate of the Indiana University Kelley School of Business and has obtained the CERTIFIED FINANCIAL PLANNER™ designation,

DEBORA A. BENNETT, CFP® MANAGING DIRECTOR



“One of the most critical commitments I think we can make to our clients is living up to our word. If we say we’re going to do something, we do it—and strive to do it right the first time. It’s taking pride in our work; and our clients deserve this level of professionalism.”

which consists of post-graduate study in the fields of investment, insurance, taxation, retirement and estate planning. She is a member of the Institute for Certified Financial Planners, the National Association of Personal Financial Advisors and the Indianapolis Estate Planning Council.

Debbi has donated much of her time and expertise to various not-for-profit organizations. Currently she serves the Central Indiana Community Foundation Professional Advisor Leadership Council, The Children's Museum of Indianapolis Planned Giving Council and the Humane Society of Hamilton County. In her “free” time, Debbi is actively involved with beagle rescues.

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-2006-5