



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Dan Ford is a Managing Director and Oxford Investment Fellow with Oxford Financial Group, Ltd. In this role he is responsible for investment manager sourcing, due diligence, asset allocation research, evaluating niche investment opportunities and portfolio construction. His expertise includes alternative investments, derivative products, quantitative analysis and financial engineering.

Before joining Oxford, Dan served as Director of Multi-Asset Strategies at the Indiana Public Retirement System. Dan had management and oversight responsibility for approximately \$6 billion invested across absolute return hedge funds, risk parity and

DANIEL J. FORD, CFA, CAIA, PRM MANAGING DIRECTOR & OXFORD INVESTMENT FELLOW



“A traditional asset allocation benefits greatly from the introduction of divergent sources of return when interests are well aligned. Oxford’s independence, scale and underwriting expertise enable clients to access top-tier alternative investment managers. Our ability to utilize these diversifying niche strategies in portfolio construction is accretive to our ultimate goal of helping clients achieve their financial aspirations.”

illiquid opportunistic strategies. He was also responsible for overseeing asset allocation research and risk management analytics for the \$32 billion defined benefit pension plan.

A graduate of the University of South Carolina, Dan holds a Bachelor of Science degree in Business Administration with an emphasis on Investment Finance and Economics. He is a holder of the Chartered Financial Analyst® designation (CFA® charterholder) and holds the Chartered Alternative Investment Analyst (CAIA) and Professional Risk Manager (PRM) designations. Dan is an active member of the CFA Society of Indianapolis.

Chartered Financial Analysts® (CFA®) are licensed by the CFA® Institute to use the CFA® mark. CFA® certification requirements: hold a bachelor's degree from an accredited institution or have equivalent education or work experience, successful completion of all three exam levels of the CFA® Program, have 48 months of acceptable professional work experience in the investment decision-making process and fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors. The Chartered Alternative Investment Analyst (CAIA) designation is a professional designation offered by the CAIA Association. CAIA designation is the globally-recognized credential for professionals managing, analyzing, distributing or regulating alternative investments. Candidates must complete a course of study and pass two examinations. CAIA designees are required to maintain membership in the CAIA Association and adhere to professional and ethical standards. The Professional Risk Manager (PRM) designation is a globally recognized, graduate-level risk management credential offered by PRMIA. The PRM program is a series of four certification exams, designed to measure the knowledge of professional risk managers and ensure they meet a specific performance standard in their profession. PRM designation holders are required to submit 20 Continued Risk Learning (CRL) credits annually to maintain the PRM designation and remain a PRMIA sustaining member. OFG-2011-12