



LEADERSHIP PROFILE

J.P. Simmons joined Oxford Financial Group, Ltd. in November, 2014 as Chief Practice Development Officer. In that capacity J.P. works with our Managing Directors helping them in the management of their practice and to ensure the firm provides an Oxford quality experience. J.P. is also a member of Oxford's Value Council Committee.

J.P. has more than 24 years of experience in the investment industry with a unique mixture of capabilities; he has worked as a consultant to Registered Investment Advisor (RIA) firms and also directly with business owners and ultra-high net worth individuals providing planning and investment advice. His professional background includes owning his own RIA, working as a vice president with Neuberger Berman and functioning as a director for a Texas-based multifamily office.

J.P. SIMMONS, CFP®, CLU® CHIEF PRACTICE DEVELOPMENT OFFICER



"I believe that excellence in the art of advice can only be achieved when we apply our best intelligence, ethics and personal care consistently throughout the key events and continual journey of those who partner with us. Our real value to our clients can be found in the superior quality of our solutions and our commitment to challenge ourselves on that measure."

Prior to joining Oxford, J.P. served as Managing Director for Business Consulting with Charles Schwab Advisor Services™, where he and his team executed practice management consulting initiatives with RIAs across the country.

J.P. has a Bachelor's degree from Indiana University and is a CERTIFIED FINANCIAL PLANNER™ professional and a Chartered Life Underwriter® He frequently speaks on numerous topics including RIA practice management, business succession and the nature of new wealth in the marketplace at numerous professional organizations, educational groups and societies across the country.

J.P. lives in Carmel with his wife, Sherry, and their daughters, Madison and Mia. He enjoys spending time with family, outdoor sports and scuba diving.

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. The Chartered Life Underwriter® (CLU®) is a professional designation awarded by The American College of Financial Services to individuals who specialize in life insurance underwriting and estate planning. Candidates are required to complete eight courses, as well as eight examinations. The designation requires 30 hours of continuing education every year. OFG-2101-02