



LEADERSHIP PROFILE

Jason Brinks is a Managing Director with Oxford Financial Group, Ltd. He specializes in working with high net worth families developing comprehensive financial plans and long-term investment strategies. He also oversees the creation of new trusts to help them protect, grow and transfer their wealth over multiple generations. Jason's primary focus is to assist family, trust and institutional clients with their investment advisory and wealth planning needs. He also has vast experience in providing investment consulting and advisory services to foundations, non-profit organizations and endowments.

Prior to making the transition to Oxford in 2011, Jason was a client service advisor with Crowe Wealth Management, a joint venture between Oxford and Crowe Horwath, LLP.

Prior to Crowe Horwath, LLP, Jason was a trust officer with a boutique bank and trust company located in Western Michigan. In this role, he worked with clients to coordinate their investments, trusts, financial planning and banking needs. He also acted as the liaison between his clients and their attorneys, accountants and other professional advisors.

JASON R. BRINKS, CFP®, CTFA MANAGING DIRECTOR



"It is a great joy to help families and other clients reach their financial goals, knowing that for many, Oxford has been with them all the way."

A graduate of Calvin College in Grand Rapids, Michigan, Jason earned a Bachelor's degree in Economics and completed the certificate program in financial planning at Grand Valley State University.

He is a graduate of the Cannon Financial Institute Personal Trust School. Jason holds designations as both a CERTIFIED FINANCIAL PLANNER™ and a Certified Trust and Financial Advisor (CTFA).

Jason's expertise is also highly utilized in community service. He is a member of the Professional Advisory Committee for Spectrum Health Foundation and a member of both the Investment Committee and Professional Advisory Committee of the Grand Rapids Community Foundation. In addition, Jason is a member of the Stewardship Committee for the Seymour Christian Reformed Church, a high school volunteer teacher for Junior Achievement of the Great Lakes and an active committee member and volunteer for Dutton Christian School. Jason is a member of the Calvin College Business Alliance and on the board of the Association of Corporate Growth Western Michigan Chapter.

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 Certified Trust and Financial Advisor (CTFA) designation is awarded by the ABA institute of Certified Bankers who demonstrate their knowledge as a trust and financial advisor. Candidates must meet one of the three following requirements to be eligible: three years of wealth management experience plus ICB-approved training, five years of personal trust experience and a bachelor's degree or 10 years of personal trust experience. Candidates are required to successfully complete a final certification examination. Candidates must complete 45 credits every three years (with a minimum of six hours in each of four knowledge areas) of continuing education. OFG-2006-7