LEADERSHIP PROFILE

Jason Armbrust is a Client Relationship Strategist at Oxford Financial Group, Ltd. In this role, Jason works closely with clients to ensure their financial planning and investment-related activities are implemented flawlessly.

Before joining Oxford, Jason served at Transamerica Financial Advisors, Inc., assisting in the financial planning process for the firm's lead advisors. His responsibilities included preparing financial plans, investment case design and strategy development, insurance case design and strategy development and estate plan review and analysis.

JASON S. ARMBRUST, CFP®
CLIENT RELATIONSHIP STRATEGIST

"My passion is to ensure that each client's goals, needs and priorities are met in a timely and accurate manner."

Jason earned a Bachelor of Science degree in Finance with a concentration in Insurance from Ball State University. He also holds a Certified Financial Planner™ designation, earned in 2015.

Jason is active in the community and his church. He previously started and led The Rainmakers Christian Professionals networking group to encourage and inspire local business professionals.

Jason, his wife Alexandria and their son and daughter live in Indianapolis. He enjoys playing golf, running, spending time with friends and family and getting involved in the local community.

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-2011-23