LEADERSHIP PROFILE

As the CEO and Managing Director of Oxford Financial Group, Ltd. Jeff Thomasson is solely focused on providing premier elite wealth enhancement experiences to individuals and families across many states. Jeff founded Oxford in 1981 upon receiving his MBA from the Indiana University Graduate Business School.

Jeff passionately reaches for higher levels of service and more customized solutions for clients, which ultimately drives Oxford's ability to help a greater number of individuals. Each client receives incredible time, attention and care, and this corner-stone allows clients to achieve their goals, some of which they didn't know they had.

From creating investment opportunities to hiring the most caring and talented team members, everything Jeff does at Oxford is focused on a desire to gain an absolute understanding of each client's needs in order to deliver advice and solutions that earn the client's ultimate confidence.

Jeff is involved in numerous private foundations and thoroughly enjoys philanthropy. Through the Thomasson Foundation, he and his family have awarded hundreds of scholarships to deserving college students over many years. Two of

JEFFREY H. THOMASSON, MBA, CFP®
CHIEF EXECUTIVE OFFICER & MANAGING DIRECTOR

"I sincerely appreciate the fact that our clients expect and demand value for their money—and they're absolutely correct in doing so. The keystone of our firm is to provide quality, objective solutions to our clients in a consistent and thoughtful manner. This is not only our professional approach—it's my personal commitment."

Jeff's favorites are annual scholarships for graduating Zionsville High School seniors in honor of Lloyd and Jane Taylor, as well as the Oliver L. Warner Educational Scholarship he provides through the Boone County Community Foundation. These two families had a life changing impact on Jeff's youth.

Jeff is a member of the YPO Gold and Chief Executives Organization, and serves on the board of POLYWOOD®, Jeff Ruby Culinary Entertainment and numerous family foundations. Previously, he served on the boards of Ontario Systems, Parkway Company, Paylink Payment Plans of Chicago, Illinois, Leadership Network of Dallas, Texas, Union Federal Bank, Indiana Bancshares, Waterfield Mortgage Corporation, Flight Options, Syndicate Systems, The Hudson Institute, Park Tudor School, Indiana Repertory Theatre and the Indianapolis Symphony Orchestra.

Jeff's abundance of experience and expertise allows him to contribute in some direct way to every clients' financial and mental peace of mind. At Oxford, each client can be confident that their affairs are being watched, strategically executed on and coordinated by a premier organization with world-class solutions.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. 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-2111-05