LEADERSHIP PROFILE

MICHAEL E. LARSON, MBA

CLIENT RELATIONSHIP MANAGER

"I continually strive to strengthen the relationships I have with my clients and their families by providing an exemplary level of service that incorporates the individualized solutions they need to help them successfully achieve their goals."

Michael Larson is a Client Relationship Manager with Oxford Financial Group, Ltd. In this capacity, Michael utilizes his 16 years of experience in the insurance, personal banking, brokerage trading and operations and investment advisory spaces to help meet his clients' unique goals.

Before joining Oxford, Michael was an Associate Portfolio Consultant at Charles Schwab & Co., Inc. In that role, he worked with high net worth clients to identify deficiencies in portfolio allocation, perform technical analysis, provide education on investment strategy and respond to his clients' service needs.

Michael graduated from Indiana University with a Bachelor of Arts in English Literature. He graduated from the University of Phoenix with a Master's Degree in Business Administration. He has received an Accredited Asset Management Specialist (AAMS) designation from The College for Financial Planning and he is currently studying for his Certified Financial Planner™ designation.

Michael, his wife Holly, and their three children Corinne, Danielle and Spencer reside in Indiana. Michael and his wife enjoy travel and being outdoors as much as possible.