



LEADERSHIP PROFILE

Rob Twitchell is a Managing Director with Oxford Financial Group, Ltd. His primary responsibilities include client service and business development within the investment services of Oxford's practice. He also is a member of Oxford's Retirement Plan Committee.

Prior to joining Oxford, Rob served as vice president for JPMorgan Asset Management, where he headed their Institutional Advisor Team's Central Region. In this role, Rob advised more than two hundred leading private wealth advisory firms on asset allocation and manager selection, specializing in institutional equity and fixed income strategies, alternative investments, behavioral finance and structured notes. During his career in investment management, Rob has held positions in investment strategy, business development and client relationship management.

Rob served as president of the CFA Society of Indianapolis in 2008-2009, and remains a member of its board of directors. He has

ROBERT M. TWITCHELL, MBA, CFA MANAGING DIRECTOR



"Staying on the leading edge of investment trends gives the clients I advise an advantage. These clients appreciate Oxford's access to world-class money managers and cutting-edge strategies, as well as our fiercely independent culture of objectivity and excellence."

been a frequent conference speaker on a range of topics and continues to present investment themes to a variety of audiences.

Rob is a member of both the finance committee of the Ronald McDonald House of Central Indiana and the advisory board of the Well House Society for the Indiana University Foundation.

Rob earned his undergraduate degree from Indiana University's Kelley School of Business in 1994, majoring in finance and international studies. He then earned his Master's degree from Georgetown University in 1999, where he was awarded a master's scholarship while completing research in investments for the United States Securities and Exchange Commission and in derivatives for Professor James N. Bodurtha. Rob was awarded the Chartered Financial Analyst (CFA) designation in 2001 and remains actively involved in the CFA Institute and the CFA Society of Indianapolis.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. Chartered Financial Analysts® (CFA®) are licensed by the CFA® Institute to use the CFA® mark. CFA® certification requirements: hold a bachelor's degree from an accredited institution or have equivalent education or work experience, successful completion of all three exam levels of the CFA® Program, have 48 months of acceptable professional work experience in the investment decision-making process and fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.

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