



## LEADERSHIP PROFILE

As Director of Investment Research, Bob Schaefer helps to lead Oxford Financial Group, Ltd.'s investment team and is a key participant in investment strategy and policy development.

His specific responsibilities include investment manager due diligence, asset allocation studies, client investment recommendations and researching new investment ideas and products. Bob has developed particular expertise in alternative investments including hedge funds, private equities, natural resources and real estate. He is a shareholder and an Oxford Investment Fellow.

Bob joined Oxford in August of 1994, bringing with him seven years of

**ROBERT L. SCHAEFER, CFA, CFP®**  
**DIRECTOR OF INVESTMENT RESEARCH &**  
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*“Textbooks often teach us that securities prices are driven by economic fundamentals and the financial prospects of individual companies. Twenty years of experience has taught me this is only partly true. Human emotion—fear, greed, confidence, ego—often plays an even larger role. This is a very good thing, for it creates opportunities for disciplined investors that don’t fall victim to such behavioral tendencies.”*

experience in the banking and investment management industries. After receiving his Bachelor’s degree in Finance from Indiana State University, Bob spent several years performing fixed income credit research and corporate financial analysis. Previously, he worked for Unified Management Corporation, National City Bank and the Federal Home Loan Bank of Indianapolis.

Bob earned the Chartered Financial Analyst (CFA) designation in 1994, widely regarded as the premier designation for investment professionals, and became a CERTIFIED FINANCIAL PLANNER™ in 2000. Bob is a current member and former president of the CFA Society of Indianapolis.

*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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