LEADERSHIP PROFILE

SUSAN HAGLEY, MST
SENIOR WEALTH STRATEGIST

"Wealth planning is a uniquely personal endeavor. I enjoy the opportunity to provide clarity and simplification around a client's planning, so they fully understand the impact on their family and long-term goals."

Susan Hagley is a Senior Wealth Strategist for Oxford Financial Group, Ltd. Susan's expertise is focused around the development of efficient tax and estate planning strategies. She partners with Managing Directors to determine the best way to implement these strategies, and to assist with the overall financial planning needs to benefit Oxford's clients.

Susan joined Oxford in 2016 and has been an integral member of our Family Office Services team, previously holding the positions of Wealth Planner and Wealth Strategist. In these roles, Susan's primary focus was to review and illustrate clients' estate plans and develop strategies to help them accomplish their goals. She also modeled cash flow for retirement, education savings and estate planning.

Prior to joining Oxford, Susan was a Wealth Planner for Mirador, a multi-family office that was a division of Fifth Third Bank. In this role, she served as a technical resource and assisted in the creation of multi-generational wealth plans and wealth strategy illustrations.

Susan also spent a decade in public accounting concentrated on the taxation of high net worth individuals, private foundations and family partnerships.

Susan earned a Bachelor of Science degree in Accounting and a Master of Science in Taxation degree from Grand Valley State University.

Susan is a Grand Rapids native. She has two children and enjoys spending time with family and being active outdoors.