



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

SUSIE E. HARPER

CLIENT RELATIONSHIP MANAGER



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“I am committed to providing each client the highest level of service while working with them to fulfill their financial goals and aspirations.”

Susie Harper is a Client Relationship Manager at Oxford Financial Group, Ltd. In this role, she works closely with clients to ensure the seamless coordination of services and implementation of their financial needs and goals.

Susie originally joined Oxford in 2007 as an Executive Assistant and has been promoted into several departments in the firm including Client Reporting, Implementation and, most recently, Client Service. Susie’s wealth of

knowledge around various aspects of the firm allows her to provide excellent service to each client and assist in all aspects of the clients’ planning and investing strategies.

Prior to joining Oxford, Susie began her career with ProAssurance. She received her Bachelor’s degree in Finance from University of Phoenix and is currently pursuing her Certified Financial Planner™ professional designation.