OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Rick Davis is a Managing Director within Oxford's Family Office Services practice. He is also a member of Oxford's Board of Directors, Compensation Committee, Partners Legacy Committee and Mayfair Committee.

Rick strongly embodies the "Oxford Advantage". He brings an owner's mentality to the business owner and other clients he serves. He is creative, results-oriented and focused on client satisfaction. He is a supreme expert in his craft.

At Oxford, Rick serves client families in the areas of wealth accumulation, multi-generational estate planning, business succession, charitable giving, investment strategy, risk mitigation and family governance and legacy strategies.

Clients choose to work with Rick because of his unique background in law and business and his ability to facilitate conversations that assist clients in identifying their goals, which enables them to be more intentional in their planning. Rick is also adept at coordinating Oxford clients' other professional advisor relationships to derive maximum value.

C. RICHARD DAVIS II, JD, CFP®

MANAGING DIRECTOR

"I personally appreciate the value that Oxford delivers to our clients. We build trust with discretion and unbiased advice. And with our unique way of working with clients and their professional advisors, we ensure that every plan, recommendation and good idea is implemented. With integrity, accountability and detailed follow-through, we build and protect family legacies for our clients."

Rick graduated in 1981 with High Distinction from Indiana University's Kelley School of Business with a Bachelor of Science degree in Business Finance. After graduating from the University of Michigan Law School, where he was an Editor of the Michigan Law Review, he practiced law in New York City with Sullivan & Cromwell, a prominent Wall Street law firm, advising investment banking, financial institutions and large industrial clients in the areas of securities regulation and finance.

Prior to joining Oxford, Rick was a co-owner of a three-generation family business in Indianapolis, where his responsibilities included finance, strategic planning, and oversight of legal, tax, accounting, governance and insurance matters.

Rick is Vice Chairman Emeritus of the AAA Hoosier Motor Club Board of Directors and its related insurance subsidiaries. Rick has worked with numerous charitable and philanthropic organizations, most recently serving as a member of the National Lay Review Committee of the Juvenile Diabetes Research Foundation, where he helps oversee the distribution of more than $120 million in funding for Type 1 diabetes research each year.