



LEADERSHIP PROFILE

JULIA S. WEAVER, J.D., LL.M.

CHIEF WEALTH PLANNING OFFICER & FAMILY OFFICE FELLOW



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“A wealth transfer plan is the infrastructure that houses our client’s legacy. Like any structure, it is subject to the elements of time. Our family office and trust teams are the fortress around the plan, constantly working to assure its sustainability and relevance for generations to come.”

Julia Weaver is the Chief Wealth Planning Officer and a Family Office Fellow for Oxford Financial Group, Ltd. She brings over two decades of experience working with clients and advisors to structure and protect comprehensive estate and business succession plans. Julia manages the Family Office Fellows and leads a team of subject matter experts including attorneys, CPAs and CFP® professionals with diverse backgrounds in multi-generational wealth transfer planning, federal estate and income tax planning, charitable planning, business succession and comprehensive financial planning, all designed to provide clients with peace of mind that their unique goals and objectives will be accomplished. Julia serves on the Senior Management Committee.

Prior to joining Oxford in 2015, Julia practiced law in the area of wealth transfer and business succession planning, and also served as the Senior Wealth Strategist at Regions Private Wealth Management for a seven state area where she oversaw strategic wealth transfer and charitable planning for families and exit planning for business owners.

Julia earned her Doctor of Jurisprudence from Indiana University’s Robert H. McKinney School of Law in 1994 and Master of Laws in Taxation cum laude in 2017 from the University of Alabama. She has lectured extensively on estate planning and exit planning strategies to both professional and client audiences. She served as Chair of the Indianapolis Bar Association Estate Planning and Administration Section (2015), and remains an active member of the Council. She is on the Board of the Estate Planning Council of Indianapolis, as well as the Professional Advisor Leadership Council (PALC) for the Central Indiana Community Foundation and the Planned Giving Committee for the Indianapolis Zoo. She is a member of the Indiana State Bar Association and was past Chair of the Low Asset Will Program and the Pro-bono Standing Committee for the Indianapolis Bar Association.

Julia was a board member for the Leukemia and Lymphoma Society of Indiana and Key Club Chairperson (Regions Bank) for the United Way of Central Indiana. She lives with her family on Morse Reservoir in Noblesville, Indiana, and enjoys water sports, running and traveling.