SPECIAL UPDATE

FROM

OXFORD FINANCIAL GROUP, LTD.

Dear Oxford Friends and Associates,

With the events surrounding the spread of COVID-19 (coronavirus), we are facing a truly unprecedented situation here and around the globe. I want to reinforce to you our continued commitment to the health and safety of our clients and associates and to meeting your needs during this challenging time. With the situation changing daily, we wanted to share with you our perspective, and to reassure you that we will remain focused on serving you now and in the weeks and months to come.

Since its founding in 1981, Oxford has evolved and grown with clients over many challenging times in our world, including the 9/11 terrorist attacks and 2008-2009 financial meltdown. We have been through tough times and together have weathered the storms and come out stronger than ever. We feel confident this crisis will prove no different. We have a strong and experienced team of experts who have lived through these past national events, and they stand ready to guide you through this newest challenge.

- Our veteran internal investment research team, the Oxford Investment Fellows, stand ready to share their experience and expertise on how to leverage market events for the best possible outcome.

- Our highly credentialed Family Office Services professionals, the Family Office Fellows, are equally ready to leverage market and economic events for planning purposes.

- Our experienced group of Managing Directors know you and your situation and stand ready to support you.

We want to do our part to support the health and safety of our clients and associates, help the communities in which we live and to support all state and national efforts to curb the spread of COVID-19. For these reasons, we are encouraging many of our associates to work from home. For those associates that continue to work from the office, we have implemented common-sense health precautions including frequent hand washing, limited contact with other associates and increased office cleaning. As things evolve, there may come a time when all of our associates work from home. We have solid business continuity plans in place to ensure we fully serve you, regardless of where we are working from. Some key highlights of our business continuity plans include:

- All of our associates are equipped to seamlessly transition to working from home, with no decrease in service to you. Work will continue at 100 percent capacity.

- All phones and emails will be forwarded so communication will continue uninterrupted.

- We will continue to be available for immediate conference calls on demand at your request.

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We understand that the duration of this situation is an unknown, and may take longer to resolve than we currently expect. We stand ready and available to work from home indefinitely, at full capacity. This is an incredibly challenging time, but we remain optimistic about the future. We are fully focused on serving you and together we will weather this crisis. Please don't hesitate to contact us if we can be of any assistance.

Sincerely,

Jeffrey H. Thomasson, MBA, CFP®
Managing Director and Chief Executive Officer

About Oxford Financial Group, Ltd™

Oxford is the premier multi-family office in the Midwest and has been named the #1 Registered Investment Advisor (RIA) by *Financial Planning* magazine for five consecutive years (based upon assets under management). One of the largest independent RIA firms in the country with oversight of approximately $23.7 billion in assets under advisement (which includes assets under management), Oxford has 21 managing directors in five market offices who serve over 700 family and institutional clients in 37 states. Oxford is an independent, fee-only firm that is privately held by its partners and has provided muli-generational estate planning advice and forward-thinking investment solutions to families and institutions for more than 37 years. With special expertise in Bespoke Generational Solutions, Aspirational Solutions and Niche Growth Strategies, Oxford specializes in serving clients with net worth above $5 million.

For additional information, call 800.722.2289, visit ofgltd.com or submit a request.