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SPECIAL UPDATE
FROM
OXFORD FINANCIAL GROUP, LTD.

Dear Oxford Friends,

During this ugly rainy weekend in the Midwest, I thought I would try to do something bright and cheery; and that is to reach out to ALL of our Oxford Friends to tell you how we have truly appreciated you during this 2020 Year! Of course, we appreciate you every year, but this year I think we at Oxford have spent significantly more time reflecting upon how important each of you are to us and how much we feel blessed to work with you, serve you, enhance your lives, hopefully make your lives easier, assist in meeting your investment and estate goals, communicate with you in a manner that is flattering to the times we find ourselves in...and on and on.

With so many friends suffering from COVID-19 and several passing away, every single day and week we have been trying to adjust our attitudes and recognize that we have SO MANY things to be thankful for during this challenging year and one of them is you!

I recently thought how refreshing it would be to reach out to each one of you and speak to you on the phone to personally tell you the above; however, of course that is not realistic. But, please know that this is my DESIRE!

As some of the Partners of the firm have been safely “socially out and about,” it has been more than gratifying to see the look on our friend’s faces when they see another friendly face. I have been one of those Partners who is still getting out quite frequently, and very often a guest during breakfast or lunch tells me that this is the first meeting outside their home that they have had since March! They were so grateful that I had reached out to them to connect and break bread together. This is just the tip of the spear that summarizes how tragic this year has been for us and so many others, like you.

The good news is that it looks like the vaccine is here. The bad news is that the virus will not likely be contained until the end of the second quarter of next year. In the meantime, please continue to stay safe. Especially during the holidays when the temptation to be a little more casual is always upon us.

Now, some of you may ask, how is Oxford doing? Well, the short answer is that absent the tragedy of the “COVID Attitude Thing” and the health aspects of some of our colleagues, we have done very well during 2020. You will be getting a full report in our Annual Report in a couple of weeks. In the meantime, we had a record financial year (thanks to our expense management, ugh). Our firm continues to be ranked in the top 5 of two different industry rankings around the country and around the world. These include ranking #5 in Caproasia’s 2020 Top 10 Largest Multi-Family Offices in the World and #5 in Financial Planning magazine’s RIA Leaders 2020: Top 15 Firms Ranked by AUM.

We have brought into the firm a couple of new Managing Directors that we are very proud of. We hired a new Chief Investment Officer (our previous CIO retired earlier in the year) from a very large single family office in Naples, Florida where he was the CIO of their Private Equity Platform. We have expanded our leadership on the Family Office Technical Team. Our technology to keep the trains on time has performed second to none, thanks to the leadership of smart professionals who have been working tirelessly to accommodate our associates and our clients who now realize how important it is to have state-of-the-art technology (and be able to afford it!). We did not let a single associate go as a result of the virus and we did not cut any of our colleagues compensation this year due to Covid. Thank goodness for all the above, because steady employment and income for our colleagues is so important during these challenging times. One truly nice surprise is that our "new business/new clients" has been particularly strong and we have lost almost zero clients this year. These kind of financial metrics always present a positive reinforcement for an independent, partner-owned organization like ours that is committed to private and independent ownership indefinitely and forever.

Lastly, this was definitely the year of estate planning and generational planning. Especially multi-jurisdictional planning in states like Nevada, South Dakota and Delaware. We established dozens and dozens and dozens of dynastic trusts this year. The final numbers are not in...but it is going to be massive. Further, what has made these entities (including those that we have done for the last 15-20 years) is that they are tailor-made for our Private Market Solutions, where the patriarch and matriarch can make investments for the benefit of themselves, G2, G3 and G4. The good gets better. The best gets awesome!

Well, the primary purpose of this communication this weekend was to send you a true and sincere thank you for your business. Thank you for your introductions. Thank you for your referrals. Thank you for your confidence. Thank you for your kind remarks to me and our colleagues. Thank you for your patience during this challenging year. And, please know that it is truly an honor to be of assistance to each of you, our important Oxford friends, each and every year; this year in particular when we have done a better job of taking stock of our blessings and they definitely include each of you.

Have a Happy Holiday and a Merry Christmas and a Happy Whatever other special tradition you share with those you love. Wishing for a much (MUCH) better 2021 as I count the days until I get my vaccine, 131!!

Warm Regards,

A handwritten signature in black ink, appearing to read "Jeff", written in a cursive style.

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