



LEADERSHIP PROFILE

Bo Ramsey serves as Co-Managing Partner & Chief Investment Officer for Oxford Financial Group, Ltd. In this role he oversees Oxford's Investment Management Group and the Oxford Investment Fellows by establishing the long-term investment vision, philosophy and strategies for Oxford's CIO practice. Bo acts as the lead oversight for all investment manager due diligence criteria and asset allocation policies. He is individually responsible for sourcing and vetting specific private market investments and for performing investment research. Bo serves on the Senior Leadership Committee, Oxford Investment Board and Mayfair Board.

Prior to joining Oxford, Bo served as Co-Chief Investment Officer at Pendyne Capital, LLC where he managed alternative investment portfolios including a \$150 million private equity and venture capital portfolio and an \$80 million hedge fund portfolio. He also served on the board of directors for three portfolio companies. Prior to his time at Pendyne Capital, Bo was Deputy Chief Investment Officer at

**ROBERT "BO" D. RAMSEY III,
JD, MBA, CFA, CAIA
CO-MANAGING PARTNER &
CHIEF INVESTMENT OFFICER**



"Strategic asset allocation, a long-term focus and diversification combine to form the foundation of successful investment portfolios. Our ability to successfully access and underwrite investments and investment managers in alternative asset classes also significantly benefits our clients' portfolios. At Oxford, we help our clients achieve their financial aspirations by utilizing our scale, access and underwriting expertise to make targeted investments and build diversified investment portfolios."

Indiana Public Retirement System, where he managed the \$3.5 billion private equity, \$6.3 billion public equity and \$2.7 billion risk parity portfolios.

Bo received his Bachelor of Science and his Master of Business Administration from Indiana University Kelley School of Business. He received his Juris Doctor from Indiana University McKinney School of Law, where he graduated *cum laude*. He is a Chartered Financial Analyst and a Chartered Alternative Investment Analyst.

Bo is a Board Member and Investment Committee Member of the Indianapolis Symphony Orchestra Foundation, an Advisory Board Member of Pacenote Capital, LLC and a Board Member of Stryve Foods, LLC and Top Echelon Software, LLC.

Bo is married and has three children and one dog. His hobbies include running, paddle boarding, golf, reading and travel. He is a fan of Indiana University sports, the Indianapolis Colts and the Chicago Cubs.

The Juris Doctor (JD) is a graduate degree in law. The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. Chartered Financial Analysts® (CFA®) are licensed by the CFA® Institute to use the CFA® mark. CFA® certification requirements: hold a bachelor's degree from an accredited institution or have equivalent education or work experience, successful completion of all three exam levels of the CFA® Program, have 48 months of acceptable professional work experience in the investment decision-making process and fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors. The Chartered Alternative Investment Analyst (CAIA) designation is a professional designation offered by the CAIA Association. CAIA designation is the globally-recognized credential for professionals managing, analyzing, distributing or regulating alternative investments. Candidates must complete a course of study and pass two examinations. CAIA designees are required to maintain membership in the CAIA Association and adhere to professional and ethical standards. OFG-2212-25