



LEADERSHIP PROFILE

Matt Bell is a Managing Director with Oxford Financial Group, Ltd. Leaning on his investment expertise, extensive leadership experience and professional acumen, he builds quality personal relationships with the families he advises.

Prior to joining Oxford, Matt served in a leadership role as the Head Portfolio Manager for the private client group at Fort Washington Investment Advisors, Inc. His responsibilities included investment strategy, management of complex portfolios and ongoing advice on over \$300 million of capital for the firm's ultra-high net worth families and institutions. Matt also served as a subject matter expert for the firm with respect to conveying market views, analysis of asset allocation and appropriate risk management. Prior to Fort Washington Investment Advisors, Inc., Matt was a Captain in the United States Army where he was a Battery Commander responsible for the combat readiness and executive

MATTHEW A. BELL, MBA, CFA, CFP®, CAIA MANAGING DIRECTOR



"My top priority is to thoroughly understand my client's aspirations, apply the vast resources at Oxford's disposal and exceed their expectations at every step. I believe in continually challenging myself on the measure of my client's success."

oversight of over 150 soldiers. Additionally, Matt graduated from the Army Ranger School, the premier leadership program for the US Army.

Matt earned a Master of Business Administration (MBA) from Indiana University's Kelley School of Business with concentrations in Finance and Accounting. Additionally, he earned his Bachelor of Science degree in Management from the United States Military Academy at West Point, where he also served as a three-time captain of the Army men's basketball team. Matt has earned the Chartered Financial Analyst (CFA) and the Chartered Alternative Investment Analyst (CAIA) designations, and also maintains the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification.

Matt lives in Noblesville, Indiana with his wife Danelle and their three children. He enjoys spending time with his family, exercising, IU sports and reading.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. 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. 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. CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals are licensed by the CFP® Board to use the CFP® mark. CFP® certification requirements include: bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP® Board (www.cfp.net), successful completion of the CFP® Certification Exam, comprised of two three-hour sessions, experience requirement: 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements, successfully pass the Candidate Fitness Standards and background check, agree annually to be bound by CFP® Board's Standards of Professional Conduct and complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and Standards of Professional Conduct. OFG-2107-25