



## LEADERSHIP PROFILE

Scott Sandee is a Managing Director with Oxford Financial Group, Ltd. He has over 20 years of experience in the financial services industry that includes expertise in the dynamics and family impacts of mergers and acquisitions, intricate estate planning, usage of trusts and multifaceted alternative investment structures. Scott specializes in helping clients embrace Oxford's family office resources to address many of the complex issues of a multi-generational MasterPlan.

Prior to joining Oxford, Scott served as Senior Vice President of the Private Client Group for Capital Group. In this role, he led a team of professionals in the areas of trust administration, coordination of private investment management within the firm's global offering, philanthropic planning and overall wealth strategy. Prior to that, Scott was a Senior Vice President at Northern Trust leading a team of professionals in serving entrepreneurs and large families throughout the Midwest.

**SCOTT A. SANDEE**  
**CFP® , CIMA® , CPWA® , CEPA**  
**MANAGING DIRECTOR**



*"It is my privilege to be a steadfast advocate for the interests of my clients and a steward for their future generations. My clients' peace of mind is my pursuit. Deeply understanding their unique concerns, lifetime goals and legacy aspirations is the foundation of our work together. I am solely focused on achieving my clients' objectives with their wealth and lives, freeing them to focus on their expertise and passions."*

Scott graduated from Northern Illinois University with a Bachelor's degree in Computer Science. Scott also served as a non-commissioned officer in the United States Marine Corps. He is a CERTIFIED FINANCIAL PLANNER™ professional, holds the Certified Investment Management Analyst (CIMA®) and Certified Private Wealth Advisor (CPWA®) designations and earned the Certified Exit Planning Advisor (CEPA) credential.

Scott is a native of the Chicagoland area and resides with his wife, Laura, and their two children in Wilmette. Scott and Laura have been involved in a diverse group of local charitable organization and are particularly interested in efforts that benefit children and work to end hunger. He is a member of the Association for Corporate Growth, the University Club and the Northbrook Sports Club.

*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](http://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. The Certified Investment Management Analyst® (CIMA®) designation awarded by the Investments and Wealth Institute demonstrates certification in portfolio construction, focusing on asset allocation, due diligence, risk measurement, investment policy and performance measurement. Candidates for the program must complete an executive education program through an approved education provider and successfully complete the certification exam. CIMA designees are required to complete 40 hours of continuing education every two years. Also awarded by the Investments and Wealth Institute, the Certified Private Wealth Advisor® (CPWA®) is an advanced professional certification for advisors who serve high-net-worth clients. It's designed for seasoned professionals who seek the latest, most advanced knowledge and techniques to address the sophisticated needs of clients with a minimum net worth of \$5 million. Unlike credentials that focus specifically on investing or financial planning, the CPWA® program takes a holistic and multidisciplinary approach. The Certified Exit Planning Advisor (CEPA) Program is a five-day executive MBA-style program that trains and certifies qualified professional advisors in the field of exit planning. OFG-2107-35*