



LEADERSHIP PROFILE

As Chief Wealth Planning Officer and Family Office Fellow, Terry LaBant manages and oversees the daily operations of Oxford Financial Group, Ltd.'s Family Office Services team, Private Family Services team and The Trust Company of Oxford®. He serves as a wealth planning technical resource for the firm, aligning with the Oxford Investment Fellows to execute solutions and ensure clients receive the full Oxford experience.

Terry brings three decades of experience working with clients, advisors and professionals structuring and protecting comprehensive multi-generational estate, business succession and philanthropic plans. Prior to joining Oxford, Terry practiced law for two decades in the areas of wealth transfer, estate administration, business succession and charitable planning. He then served as the Director of Wealth Strategy, Private Trust and Family Office Services for two national RIA firms.

Terry earned his Bachelor of Arts, *summa cum laude*, from John Carroll University. He went on to earn his Doctor of

TERRENCE M. LABANT, JD CHIEF WEALTH PLANNING OFFICER & FAMILY OFFICE FELLOW



"I joined our profession to serve the needs of families. They deserve our greatest care and respect while enhancing and protecting their wealth. I remain honored by the trust each family places in me to steward their history, mission and legacy."

Jurisprudence from the Northwestern University Pritzker School of Law.

Terry has written and lectured extensively on estate, business succession and charitable planning to professional and client audiences. He served as chair of the DuPage County Bar Association Estate and Trust Committee and as a member of the Chicago and DuPage County Estate Planning Councils. He also served as a board member of Holy Trinity High School, advisory board member of Aspire of Illinois and special pro-bono counsel to several charities serving the health care and family service needs of disabled children and adults.

Terry lives with his family in Noblesville, Indiana, and enjoys cooking, home brewing and outdoor sports. Terry has toured most of the country by motorcycle, including a 1,100 mile round trip to Memphis in one day to enjoy barbeque. He maintains a private pilot's license with instrument rating and looks forward to touring the country again by air.

The Juris Doctor (JD) is a graduate degree in the study of law. OFG-2201-25
