



## LEADERSHIP PROFILE

Julia Weaver is a Managing Director and Family Office Fellow for Oxford Financial Group, Ltd. She brings over two decades of experience working with clients and advisors to structure and protect comprehensive estate and business succession plans.

Prior to joining Oxford in 2015, Julia practiced law in the area of wealth transfer and business succession planning, and also served as the Senior Wealth Strategist at Regions Private Wealth Management for a seven state area where she oversaw wealth strategy, business succession planning and charitable planning for affluent families.

Julia earned her Doctor of Jurisprudence from Indiana University's Robert H. McKinney School of Law in 1994 and Master of Laws in Taxation *cum laude* in 2017 from the University Of Alabama School of Law. She has lectured extensively on estate planning and exit

### JULIA S. WEAVER, JD, LL.M. MANAGING DIRECTOR & FAMILY OFFICE FELLOW



*"A wealth transfer plan is the structure that houses our client's legacy. Like any dwelling, it is subject to the elements of time. Our family office is the fortress, constantly working to ensure the sustainability and relevance of the estate plan for generations to come."*

planning strategies to both professional and client audiences. She served as Chair of the Indianapolis Bar Association Estate Planning and Administration Section (2015) and remains an active member. She is on the Board of the Estate Planning Council of Indianapolis, as well as the Professional Advisor Leadership Council (PALC) for the Central Indiana Community Foundation and the Planned Giving Committee for the Indianapolis Zoo. She is a member of the Indiana State Bar Association and was past Chair of the Low Asset Will Program and the Pro-bono Standing Committee for the Indianapolis Bar Association.

Julia was a board member for the Leukemia and Lymphoma Society of Indiana and Key Club Chairperson (Regions Bank) for the United Way of Central Indiana. She lives with her family on Morse Reservoir in Noblesville, Indiana, and enjoys water sports, running and traveling.

*The Juris Doctor (JD) is a graduate degree in law. The LL.M. degree is a specialized law degree that practicing lawyers who have already passed the bar exam pursue as a way to advance their knowledge of law. OFG-2110-10*

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