



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Parker Mitchell is a Managing Director with Oxford Financial Group, Ltd. His focus is working with clients to help them navigate the complexities of financial markets by providing customized advice based on a thorough understanding of their personal values, wealth transfer goals and vision for their business and legacy.

Prior to joining Oxford, Parker was a Principal and Senior Client Advisor at Bessemer Trust, where he led a team responsible for providing ultra-high-net-worth clients with proactive, highly-personalized advice across investment management, wealth planning and family office services. Before Bessemer, Parker was a Managing Director with Cresset, managing over \$1 billion in client assets. Parker began his career at Cambridge

J. PARKER MITCHELL, MBA, CFA, CFP® MANAGING DIRECTOR



“My goal is to bring Oxford’s world-class resources to bear to help clients do more with their wealth. I am focused on guiding clients to the peace of mind that comes with knowing their net worth is productive, secure and aligned with fulfilling their financial and personal goals.”

Associates advising single family offices and institutional investors in portfolio construction and implementation, financial planning and family office services.

Parker earned his bachelor of arts degree in philosophy from the University of Mary Washington in Fredericksburg, Virginia. He went on to earn a master of business administration (MBA) from Georgia Tech’s Scheller College of Business with a concentration in finance. Parker is a holder of the Chartered Financial Analyst® designation (CFA® charterholder) and is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.

Parker lives in Atlanta, Georgia with his wife Maggie and their two children. He enjoys spending time with his family, exercising, watching Atlanta United soccer and reading.

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. 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-2304-23