PRESS RELEASE: OXFORD OPENS NEW LOCATIONS IN ATLANTA AND PALM BEACH

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CARMEL, IN June 12, 2023– Oxford Financial Group, Ltd. is pleased to announce the expansion of its brick and mortar office locations with a new office in Atlanta, Georgia's Buckhead district and a new office in Palm Beach, Florida.

In the last decade or so Oxford has evolved from being a Midwest powerhouse to a nationally-focused multi-family office with clients in 35 states. Oxford has been working in Atlanta and Palm Beach regularly for decades, and sees significant advantages for their clients and partners in establishing a physical presence in these markets. Atlanta is the business epicenter for the entire Southeast with connectivity and influence in a region that includes seven states and also boasts an international reach. Palm Beach enjoys a concentration of business owners and legacy family wealth that has long been serviced by Oxford. Expanding Oxford's presence and influence in these markets is beneficial for the firm's effectiveness and focus for the clients Oxford serves.

Managing Directors who will be serving these new markets include:

Kevin W. Coquillette: Kevin provides multigenerational families, business owners and institutions guidance around Chief Investment Officer Services. Prior to joining Oxford, Kevin was a Vice President with Goldman Sachs Asset Management.

Barton C. Francis, MST, CFP®, CIMA®: Bart brings his deep technical, business and experiential background in financial, estate, trust and tax planning to develop and monitor creative strategies for families of significance, helping them enhance and preserve their wealth. Prior to joining Oxford, Bart spent over a decade at Bessemer Trust as a Principal and Senior Client Advisor.

Grayson E. Miller: Grayson provides multi-generational families of significant worth, business owners and select institutions customized and highly relevant wealth enhancement strategies. She works with clients to optimize their investment strategies and coordinate strategic outcomes with the family's legacy plan. Prior to joining Oxford, Grayson served as a Private Wealth Advisor at Goldman Sachs in Atlanta.

J. Parker Mitchell, MBA, CFA, CFP®: Parker focuses on helping clients 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.

ABOUT OXFORD
One of the largest independent RIA firms in the country with oversight of approximately $31.53 billion in assets under advisement*(which includes assets under management), Oxford has 20 Managing Directors who serve over 700 significant families and prodigious institutional clients in 35 states.** Oxford is an independent, fee-only firm that is privately held by its partners, with special expertise in Bespoke Generational Solutions, Aspirational Solutions and Diversifier Strategies. Oxford has provided multigenerational estate planning advice and forward-thinking investment solutions to families and institutions for more than 42 years.

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OXFORD'S ATLANTA PARTNER TEAM

(Standing left to right:) Grayson E. Miller, Barton C. Francis, Matt A. Bell, Peter N. Reist, Jeffrey H. Thomasson, Robert "Bo" D. Ramsey III, C. Richard Davis II, Nicholas S. Klein, Kristina R. Baron, J. Parker Mitchell

OXFORD'S PALM BEACH PARTNER TEAM

(Standing left to right:) Kevin W. Coquillette, J. Parker Mitchell, Barton C. Francis, Grayson E. Miller Ty Schlobohm, Matt A. Bell, Jeffrey H. Thomasson, Robert M. Twitchell, Kristina R. Baron

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**As of 12.31.21*
***As of 3.15.2023*