



OXFORD FINANCIAL GROUP, LTD.™

## LEADERSHIP PROFILE

As a Managing Director at Oxford Financial Group, Ltd., Rob uses his expertise in asset allocation and public and private investments to balance return potential with risk. Rob's emphasis on building strong relationships, coupled with his ability to create and execute on multi-layer wealth strategies, embodies Oxford's overall approach to comprehensive wealth management.

Prior to Oxford, Rob served as Vice President at JPMorgan Asset Management, where he headed the institutional advisor team's central region. In this role, Rob advised more than 200 leading private wealth advisory firms on asset allocation and manager selection, specializing in institutional equity and fixed income strategies, alternative investments, behavioral finance and structured notes. Prior to that, Rob held positions in investment strategy, business development and client relationship management.

### ROBERT M. TWITCHELL, MBA, CFA MANAGING DIRECTOR



*"Staying on the leading edge of investment trends gives the clients I advise an advantage. These clients appreciate Oxford's access to world-class money managers and cutting-edge strategies, as well as our fiercely independent culture of objectivity and excellence."*

Rob earned his undergraduate degree from Indiana University's Kelley School of Business and his Master's degree from Georgetown University.

Rob is passionate about serving the financial community and was elected by his peers to be President of the CFA Society of Indianapolis in 2008-2009. He served on the Board of Directors of the CFA Society for more than a decade. He continues to contribute his talents and expertise by speaking on a variety of investment topics. He also co-authored a white paper on alternative investments titled *"Post Modern Portfolio Theory,"* which he presented to the National Association of Personal Financial Advisors, the New York Financial Planning Association (FPA) and the Houston Alternative Investment Forum.

Rob is a past chairman of the Well House Society advisory board for the Indiana University Foundation. He is also a volunteer member of both the investment committee for the Christian Theological Seminary and the finance committee for the Ronald McDonald House of Central Indiana.

*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.*

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