



LEADERSHIP PROFILE

As a Managing Director and Oxford Investment Fellow® at Oxford Financial Group, Ltd., Dan Ford's expertise lies in alternative investments, derivative products, quantitative analysis and financial engineering. Dan brings a wealth of experience and a technical eye to each individual portfolio.

Before joining Oxford, Dan served as the Director of Multi-Asset Strategies at the Indiana Public Retirement System (INPRS), where he had management and oversight responsibility for approximately \$6 billion invested across absolute-return hedge funds, risk parity and illiquid opportunistic strategies. Dan was also responsible for overseeing asset allocation research and risk management analytics for the \$32 billion defined benefit pension plan.

Prior to INPRS, Dan was a member of the Portfolio Management team within CNO Financial Group's insurance asset management subsidiary, where he was

DANIEL J. FORD, CFA, CAIA, PRM™

MANAGING DIRECTOR & OXFORD INVESTMENT FELLOW



"A traditional asset allocation benefits greatly from the introduction of divergent sources of return when interests are well aligned. Oxford's independence, scale and underwriting expertise enable clients to access top-tier alternative investment managers. Our ability to utilize these diversifying niche strategies in portfolio construction is accretive to our ultimate goal of helping clients achieve their financial aspirations."

responsible for product hedging, carry strategies, hedge fund investments and portfolio analytics for the firm's \$27 billion general account. Dan began his career as an Associate Portfolio Manager at Fifth Third Asset Management where he was responsible for credit research, risk modeling and liquidity management.

A graduate of the University of South Carolina, Dan holds a bachelor of science degree in business administration with an emphasis on investment finance and economics. Dan is an active member of the National Futures Association (NFA) and previously served on the Board of Directors of the CFA Society of Indianapolis.

Approaching every client relationship with a calculated and careful view, Dan is passionate about seeing his clients' wealth enhancement strategies succeed and thrive.

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. The Chartered Alternative Investment Analyst (CAIA) designation is a professional designation offered by the CAIA Association. CAIA designation is the globally-recognized credential for professionals managing, analyzing, distributing or regulating alternative investments. Candidates must complete a course of study and pass two examinations. CAIA designees are required to maintain membership in the CAIA Association and adhere to professional and ethical standards. The Professional Risk Manager (PRM) designation is a globally recognized, graduate-level risk management credential offered by PRMIA. The PRM program is a series of four certification exams, designed to measure the knowledge of professional risk managers and ensure they meet a specific performance standard in their profession. PRM designation holders are required to submit 20 Continued Risk Learning (CRL) credits annually to maintain the PRM designation and remain a PRMIA sustaining member. OFG-2404-36