



OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

Richard Hall is a Managing Director at Oxford Financial Group, Ltd., where he demonstrates his unique ability to bring clients expert solutions to investment goals. Richard focuses on helping individuals by ensuring they are well educated and understood through the process. This understanding helps clients feel confident in their partnership with Oxford.

Richard specializes in investment management, financial planning, estate planning and client service—advising high-net-worth individuals, families and institutions. He brings nearly 26 years of experience serving individuals and families with broad financial planning expertise.

Prior to joining Oxford, Richard was the Investment Director for PNC Bank in its Wealth Management division. Prior to that he served as an investment manager for Standard Federal Bank.

**RICHARD V. HALL,
MBA, CFP®, CTFA, CWS®, CDFAs®
MANAGING DIRECTOR**



“My guiding principle in serving clients is to always speak with integrity, sincerity and honesty. To be impeccable with your words shows strength of character and is exemplified in my commitment to excellence for my clients, family, friends and community.”

Richard is a graduate of Wayne State University with both a bachelor of science and a master of business administration with a focus on investment finance. He is a CERTIFIED FINANCIAL PLANNER™ professional, Certified Trust and Financial Advising professional, Certified Wealth Strategist® and Certified Divorce Financial Analyst™.

Richard is involved in a number of charitable and community endeavors. He and his wife, Christina, live in Greenwood, Indiana with their three children.

Richard aims to make his clients feel confident in the investment planning process and rest easier knowing that they have someone on their team who understands what they are facing and will partner with them to help make their goals a reality.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. CERTIFIED FINANCIAL PLANNER™ 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. The Certified Trust and Fiduciary Advisor (CTFA) designation is awarded by the ABA institute of Certified Bankers who demonstrate their knowledge as a trust and financial advisor. Candidates must meet one of the three following requirements to be eligible: three years of wealth management experience plus ICB-approved training, five years of personal trust experience and a bachelor's degree or 10 years of personal trust experience. Candidates are required to successfully complete a final certification examination. Candidates must complete 45 credits every three years (with a minimum of six hours in each of four knowledge areas) of continuing education. The Certified Wealth Strategist® (CWS®) designation is awarded by the Cannon Financial Institute to candidates who demonstrate competency in the wealth management field and the issues that may face high net-worth clients. Candidates must have three years of experience in the financial services industry that must also include direct interaction with clients and a 4-year degree from an accredited school. Candidates must complete two training sessions, self-study on wealth management issues and a capstone project, followed by ten mastery exams. The CWS® is required to complete 33 hours of continuing education every two years. The Certified Divorce Financial Analyst® (CDFA®) designation is awarded to professionals who address unique financial issues of divorce with data to help achieve equitable settlements. To obtain the designation, candidates must complete the course of study and successfully pass the examinations. The position requires 15 hours of divorce-related continuing education every two years. OFG-2404-23