# LEADERSHIP PROFILE

Paige Kirkland is a Managing Director and Family Office Fellow at Oxford Financial Group, Ltd. Paige serves as a technical resource and subject matter expert in comprehensive wealth planning for the firm. Her principal responsibilities include applying her talent and experience to maximize wealth enhancement and strengthen the legal impacts of the ultra-high net worth families she serves. She is adept at navigating complex trust and entity designs and ensures each of the families she works with enjoys the benefits of a wealth MasterPlan.

Prior to joining Oxford, Paige was a Senior Advisor in the Family Office division of BKD, LLP. In that role she was responsible for guiding the most significant clients of the firm in complex tax, estate planning and wealth transfer strategies. She worked side by side with the clients' CPAs and attorneys to ensure a coordinated approach and efficient execution of all the outcomes each family desired.

## K. PAIGE KIRKLAND, JD, CFP®
### MANAGING DIRECTOR & FAMILY OFFICE FELLOW

*"I pride myself on practicing and instilling in others a fiduciary mentality. It is my responsibility to earn and sustain the trust of our clients and I am dedicated to doing this through open and frequent communication, fervent integrity in all my actions and unparalleled client service."*

Before BKD, Paige was a member of the legal department of the Trust Company of Knoxville, a multi-billion-dollar trust company offering a full line of financial services. Working with the General Counsel, she created trusts, planning and estate account documents on behalf of the firm. Her passion for working with individual clients and her unique experience and expertise in the complex details necessary in the creation of these instruments served her families well.

Paige earned her Doctor of Jurisprudence, *magna cum laude*, from the University of Tennessee College of Law. Additionally, she has her Bachelor of Science from St. Joseph's College in Psychology and Criminal Justice. Paige is also a CERTIFIED FINANCIAL PLANNER™ professional.

Paige lives south of Indianapolis with her husband, two children and eight dogs. She is an avid animal advocate and enjoys golf and reading.

*See disclosures on pages ___.*

*The Juris Doctor (JD) is a graduate degree in the study of law. 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.*
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