



LEADERSHIP PROFILE

Lorelei M. Tolson is a Managing Director at Oxford Financial Group, Ltd. In addition to serving clients and developing new business, Lorelei heads up Swindon Transition Counsel—a service for business owners who seek an orderly, financially sound and tax efficient transition of the ownership, management and/or control of their business. As evidence of her expertise in working with business owners, Lorelei holds two of the most highly respected credentials in exit planning—the Certified Exit Planning Advisor (CEPA) and the Certified Exit Planner (CEXP™) designations. She also assists high net worth families with financial and investment solutions.

Prior to joining Oxford in 2007, Lorelei served as Senior Manager in the Personal Financial Services Group of Ernst & Young, LLP's Tax Department. In this role, she assisted business owners and high net worth individuals and families with tax and financial planning.

Lorelei has a Bachelor of Science degree from Butler University, where she graduated *cum laude* with high honors in Accounting.

**LORELEI M. TOLSON,
CPA/PFS, CFP®, CIMA®, CEPA, CEXP™
MANAGING DIRECTOR**



"I believe the most important aspect of the client-financial advisor relationship is trust. Trust is earned by delivering impeccable client service year after year; by honoring client confidentiality; by being respectful, honest and responsive; by being proactive and engaging clients with new and fresh ideas; and by continually striving to exceed expectations."

Other designations Lorelei holds include Personal Financial Specialist (PFS), CERTIFIED FINANCIAL PLANNER™ and Certified Investment Management Analyst (CIMA®). She graduated with honors from the Cannon Financial Institute's Trust Tax School held at the University of Notre Dame. In addition, she successfully completed the Certified Investment Management Analyst program sponsored by Investment Management Consultants Association (IMCA) taught in conjunction with The Wharton School, University of Pennsylvania. She has also authored numerous articles on tax and financial planning topics.

Lorelei is the founder and former president of the Exit Planning Institute Central Indiana Chapter. She is currently a member of the Cornerstone Council for the Central Indiana Community Foundation, Certified Exit Planning Institute, Business Enterprise Institute, American Institute of Certified Public Accountants, Indiana CPA Society and Investment Management Consultants Association.

The Certified Public Accountant (CPA) is the statutory title of qualified public accountants in the US who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements. Certification is administered by each state. The Personal Financial Specialist™ (PFS™) designation is awarded by the American Institute of Certified Public Accountants (AICPA) to candidates who display their expertise in the field of financial planning. Candidates must be a member of the AICPA, hold an unrevoked CPA certificate issued by a state authority and have at least two years of teaching or business experience (3,000 hours equivalent) in personal financial planning within the five-year period preceding the date of the CPA/PFS application. Candidates must have 75 hours of personal financial planning education within the five-year period preceding the date of the PFS application and pass a final examination. The designation requires 60 hours of continuing education every three years. 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 Investment Management Analyst® (CIMA®) designation awarded by the Investments and Wealth Institute demonstrates certification in portfolio construction, focusing on asset allocation, due diligence, risk measurement, investment policy and performance measurement. Candidates for the program must complete an executive education program through an approved education provider and successfully complete the certification exam. CIMA designees are required to complete 40 hours of continuing education every two years. The Certified Exit Planning Advisor (CEPA) Program is a five-day executive MBA-style program that trains and certifies qualified professional advisors in the field of exit planning. The Certified Exit Planner™ (CEP™) is a designation awarded by the Business Enterprise Institute (BEI) to candidates who complete the required curriculum of nine training modules. The Exit Planning concepts covered benefit business-owner clients at all stages of ownership, from inception to ownership transfer. Once the curriculum has been completed, candidates must successfully pass an exam. The designation requires 30 hours of continuing education every two years. OFG-2006-20