# LEADERSHIP PROFILE

## PETER N. REIST, CPA/PFS, AIF®
### MANAGING DIRECTOR

*"The highest compliment one can receive is a referral from a satisfied client. As I have a fiduciary obligation to work for my client's best interests, my goal is to be their trusted advisor."*

Peter Reist is a Managing Director with Oxford Financial Group, Ltd. In this role, Peter provides personal financial planning and private office services to executives and high-net-worth families. By using his financial, tax and estate expertise, he focuses on each client to individualize a plan to meet specific goals within their risk tolerance. Peter's background also lends itself well to addressing the needs of Oxford's institutional clients, including endowments, foundations and other tax-exempt pools of assets. He also applies his financial acumen as a frequent presenter of financial planning seminars to executives, entrepreneurs and employee groups.

Prior to joining Oxford, Peter was a Managing Director with KSM Capital Advisors, LLC, a registered investment advisor. There, he worked closely with clients on a variety of income and estate planning matters.

Peter was also a tax partner at Katz, Sapper & Miller, where he had been employed since 1988. Prior to that, he was a certified public accountant with Price Waterhouse.

His years of experience in federal, state and real estate taxation involving individuals, S corporations and partnerships allow him to draw on that expertise for his clients' benefit.

A graduate of Manchester College, Peter holds a Bachelor of Science degree in Accounting and is a Certified Public Accountant (CPA), Personal Financial Specialist (PFS™) and an Accredited Investment Fiduciary® (AIF®). He is a member of the American Institute of Certified Public Accountants (AICPA) and the Indiana CPA Society (INCPAS).

Peter has been on multiple boards including the Carmel Clay Public Library and the Indiana Repertory Theater, as well as having served as a member of the finance, endowment and trustees committees at St. Mark's United Methodist Church. In addition, he is a member of the Professional Advisor Leadership Council for the Central Indiana Community Foundation and has been active with the American Cancer Society for over twenty years.

*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 data 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. The Accredited Investment Fiduciary® (AIF®) designation is granted by Fi360, formerly known as the Center for Fiduciary Studies. Those who earn the AIF® mark successfully complete a specialized program on investment fiduciary standards of care, pass a comprehensive examination and attest to a Code of Ethics. OFG-2408-15*