LEADERSHIP PROFILE

BRIAN D. COPSEY, MAcc, CFA, CPA (Inactive)

CHIEF FINANCIAL OFFICER

"At Oxford, we are dedicated to leading with integrity, clarity and an unwavering commitment to sustainable growth for our clients and stakeholders. In our pursuit of excellence, we embrace evolution, adaptability and a collaborative spirit, constantly learning from one another. Together, we aim to align financial strategy with vision, ensuring that each decision propels us toward enduring success."

Brian Copsey serves as Chief Financial Officer (CFO) for Oxford Financial Group, Ltd., providing executive leadership and strategic oversight of the firm's finance organization. He is a member of the Senior Leadership Team and Value Council.

As the CFO of Oxford, Brian brings a wealth of experience in financial leadership and a balanced approach to operational and financial challenges. His background spans Fortune 100 corporate finance, direct investing and M&A advisory, complemented by his expertise in technical accounting. Throughout his career, Brian has proven adept at identifying key insights and crafting innovative solutions to complex financial issues.

Before joining Oxford, Brian served as Senior Vice President of Finance and Capital Markets for a family office, where he led critical project financing initiatives, sourcing and securing debt and mezzanine financing and managing significant investment activity. Prior roles include senior financial positions at United Airlines, Brookfield Asset Management, Pine River Capital Management and PwC, where he delivered strategic financial planning, operational oversight and market research in various high-impact capacities.

Brian received his Bachelor of Business Administration and his Master of Accounting (MAcc) from the University of Wisconsin. He is a Chartered Financial Analyst® (CFA® charterholder) and received his Certified Public Accountant (CPA) certificate. Brian is an active member of the CFA Society of Indianapolis.

Brian serves as an Advisory Board Member for the Faith & Action Project, a multi-sector, interfaith, collaborative approach to inspiring a pathway from poverty to prosperity in Central Indiana.

Brian resides in Indianapolis with his wife, their son and their Labradoodle. In his leisure time, he enjoys golfing, paddle tennis, running and traveling.

A Master of Accounting (MAcc) is a graduate-level degree that prepares students for upper-level accounting positions. The program provides students with a detailed understanding of accounting in areas such as data analytics, corporate taxation, and information systems. 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 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. OFG-2412-10