LEADERSHIP PROFILE

SUSAN E. HAGLEY, MST

MANAGING DIRECTOR & FAMILY OFFICE FELLOW

"Estate and wealth planning is a uniquely personal endeavor. I enjoy the opportunity to provide clarity and understanding, while helping to develop strategies that align with a family's goals."

Susan Hagley is a Managing Director and Family Office Fellow for Oxford Financial Group, Ltd. Her primary focus is working with Oxford's clients to review and provide insight into their current estate plan and goals to develop tax-efficient strategies that allow for wealth preservation and enhancement. Susan also assists with the overall financial planning needs of Oxford's clients by means of customized cash flow modeling.

Prior to joining Oxford, Susan was a Wealth Planner for Mirador, a multi-family office that was a division of Fifth Third Bank. In this role, she served as a technical resource and assisted in the creation of multi-generational wealth plans and estate planning illustrations.

Susan also has a decade of experience in tax planning and compliance, which contributes to her unique ability to understand and optimize planning strategies and modeling. Her area of focus was the taxation of high-net-worth individuals, trusts, estates, private foundations and family partnerships.

Susan earned a Bachelor of Science degree in Accounting and a Master of Science in Taxation degree from Grand Valley State University.

Susan lives with her family in Grand Rapids, Michigan. As a lifelong Michigander, she embraces everything each season has to offer. She enjoys being active and spending time with her close family.

The Master of Science in Taxation (MST) program is a graduate degree program specifically designed for certified public accountants and other tax professionals in the areas of conceptual understanding and technical competence. OFG-2502-2