OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

JACQUE M. NOLAN, CFP®, CIMA®
WEALTH ADVISOR

"I believe the most important aspect of building a solid relationship with each of my clients is trust. I am committed to building and earning the trust of my clients by delivering white-glove client service year after year, ensuring client confidentiality, and continuously providing them with new ideas and solutions to help them achieve their financial goals."

Jacque Nolan is a Wealth Advisor at Oxford Financial Group, Ltd. With nearly 10 years of experience serving individuals and their families in financial and wealth planning, she works to help grow and expand relationships with the clients and multi-generational families she serves. In this role, she consults and advises clients in all aspects of the financial planning process, including cash flow management, investment management and tax and estate planning.

Jacque joined Oxford in 2021 as a Relationship Manager where she worked closely with clients to gain a deep understanding of their financial objectives. She also partnered with Managing Directors to determine the best solutions and services to help clients achieve their goals.

Prior to joining Oxford, Jacque served as an Associate Relationship Strategist in PNC's Wealth Management department. In this role, she acted as the main point of contact for her clients and helped provide financial planning services to meet their needs.

Jacque earned her Bachelor of Science degree in Finance and Technology Management from Indiana University's Kelley School of Business. Additionally, she is a Certified Financial Planner™ professional and holds the Certified Investment Management Analyst® (CIMA®) designation.

Jacque is originally from the Indianapolis area and currently resides in a northern suburb with her husband, Will. In her free time, Jacque enjoys being active, spending time with family and friends and traveling to new places.

Jacque has the unique ability to understand her clients' distinctive situations and recognizes that tailoring customized financial solutions and investment strategies is of the upmost importance to them when assisting them achieve their long-term goals.

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. OFG-2509-11