LEADERSHIP PROFILE

MICHAEL E. LARSON, MBA, CFP®

WEALTH ADVISOR

"I believe the greatest honor we can receive as financial advisors is the trust our clients and their families place in us as stewards of their financial goals and aspirations. At Oxford, our goal is to continually earn that trust through our relentless focus on exceeding expectations, providing inspired and bespoke solutions to the families we serve and delivering forward-thinking investment counsel."

Michael Larson is a Wealth Advisor at Oxford Financial Group, Ltd. Having more than 20 years of experience serving individuals and their families in financial and wealth planning, he works to help grow and expand relationships with the clients and multi-generational families he serves. In this role, he consults and advises clients in all aspects of the financial planning process, including cash flow management, investment management and tax and estate planning.

Michael originally joined Oxford in 2016 as a Relationship Manager where he worked closely with clients to gain a deep understanding of their financial objectives. He also partnered with Managing Directors to determine the best solutions and services to help clients achieve their goals.

Prior to joining Oxford, Michael served as an Associate Portfolio Consultant at Charles Schwab & Co., Inc. In that role, he worked with high-net-worth clients to identify deficiencies in their portfolio allocation and overall investment strategy. He also provided education to clients and their families on various wealth management strategies to help them meet their long-term goals and objectives.

Michael earned his bachelor of arts degree in english literature from Indiana University and his master's degree in business administration from the University of Phoenix. Michael is a CERTIFIED FINANCIAL PLANNER™ professional and currently maintains his Series 65 Investment Advisor Registration.

Michael has a unique aptitude and passion for facilitating clients in identifying their financial planning goals. His ability to assist clients in navigating challenges during their various stages of life make him an excellent partner to the clients he serves.

Michael, his wife Holly and their three children reside in Fishers, Indiana. During their free time they enjoy traveling and spending time in the great outdoors.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. 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. OFG-2411-17