OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

JARRET D. BLUM, CWS®

CHIEF DEVELOPMENT OFFICER & MANAGING DIRECTOR

"We deliver not just financial expertise, but clarity in decision-making and a personalized roadmap to help provide confidence and security."

Jarret D. Blum is Chief Development Officer and Managing Director for Oxford Financial Group, Ltd. In this capacity, Jarret leads our Managing Directors in the management of their practice and helps ensure the firm provides the Oxford Quality experience the firm is known for. Jarret is the Chair of Oxford's Value Council Committee and a member of the Senior Leadership Team.

Jarret has over 20 years of experience in the investment industry with a valuable and unique mix of advisory management expertise. Prior to joining Oxford, Jarret served as Executive Director to the Select Advisor Group at J.P. Morgan Wealth Management and led their most senior advisors in generating over $100 million in annual revenue. In his tenure at Morgan Stanley & Co. LLC, Jarret worked as a Financial Advisor to ultra-high-net-worth families for 10 years, providing planning and portfolio advice by integrating hedged equity portfolios, complex option strategies and equity syndicate. He then joined the senior leadership team to further develop Morgan Stanley's advisory group. Additionally, his professional background includes leadership roles at Charles Schwab & Co., Inc. where he led complexes with over $12 billion in investible assets.

Jarret is a former NCAA Lacrosse player. He holds a bachelor's degree from Catawba College in North Carolina and received the Certified Wealth Strategist® certification from Cannon Financial Institute. He is frequently invited to speak on practice management, business development, alternative investments and economics for numerous professional organizations, educational groups and societies across the United States.

Jarret lives in Chicago with his wife, Dr. Debra Selip, and their three children. Their family enjoys winters skiing in Telluride, Colorado and summers on Delavan Lake in Wisconsin.

The Certified Wealth Strategist® (CWS®) designation is awarded by the Cannon Financial Institute to candidates who demonstrate competency in the wealth management field and the issues that may face high net-worth clients. Candidates must have three years of experience in the financial services industry that must also include direct interaction with clients and a 4-year degree from an accredited school. Candidates must complete two training sessions, self-study on wealth management issues and a capstone project, followed by ten mastery exams. The CWS® is required to complete 33 hours of continuing education every two years.
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