



## LEADERSHIP PROFILE

As a Managing Director at Oxford Financial Group, Ltd., Nicholas Klein counsels clients on portfolio construction, asset allocation, appropriate liquidity and cash flow while building sophisticated and customized investment strategies catered to generational goals.

Prior to joining Oxford in 2014, Nick was an Associate Wealth Advisor for Bessemer Trust, where he developed and maintained relationships with the professional advisor community across 10 states. The majority of his clients were ultra-high-net-worth entrepreneurs and business owners. These relationships were primarily investment-centric, but also involved estate and philanthropic planning. Nick's experience also includes Goldman Sachs, where he advised on portfolio construction with an

### NICHOLAS S. KLEIN, MBA, CAIA MANAGING DIRECTOR



*"Simply stated, I like to make people happy. As an advisor, I realize that instilling confidence, discipline and organization around a client's financial life creates an impenetrable peace of mind."*

emphasis on non-traditional exposures and alternative investments.

Nick graduated from Miami University with his bachelor's degree in business administration and finance. He also earned a master of business administration, with concentrations in economics, entrepreneurship and finance from the University of Chicago Booth School of Business.

Nick is skilled in partnering with clients who are entrepreneurs at heart and have a multi-generational vantage point. Nick approaches relationships with openness, transparency and a focus on education. He believes that relationships built on trust and confidence produce the best results and give clients a greater peace of mind.

*The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. The Chartered Alternative Investment Analyst (CAIA) designation is a professional designation offered by the CAIA Association. CAIA designation is the globally-recognized credential for professionals managing, analyzing, distributing or regulating alternative investments. Candidates must complete a course of study and pass two examinations. CAIA designees are required to maintain membership in the CAIA Association and adhere to professional and ethical standards.*

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