LEADERSHIP PROFILE

S. BOWDEN "BO" WILKINS, ChFC®, CAP®, CLU®

MANAGING DIRECTOR

"I am inspired by the notion that wealth means more than its day-to-day utility. I am passionate about helping clients recognize the greater impact their wealth can have on their family and community for generations to come. The client realizing and living their legacy is my ultimate goal."

Bo Wilkins is a Managing Director within Oxford's Family Office Services practice. Bo works with business owners and family offices to protect clients' estate and legacy. He collaborates with his Oxford colleagues and the clients' team of advisors on the design and implementation of wealth transfer strategies. His leadership, expertise and creative approach make him a sought-after industry professional.

Prior to his transition to Oxford, Bo was a founding member and partner of High Ground Company, a boutique insurance advisory firm serving ultra-affluent families. He has over three decades of experience providing white glove service in the areas of multi-generational estate, legacy and business succession planning.

Bo graduated from Hampden Sydney College and serves as a member of their alumni board. He sits on the board of the Atlanta Estate Planning Council and is a long-standing member of FINSECA, an organization made up of the top financial security professionals. He is also a two-time president of the Society of Financial Service Professionals.

Bo holds professional designations as a Chartered Financial Consultant® (ChFC®), Chartered Advisor in Philanthropy® (CAP®) and Chartered Life Underwriter® (CLU®).

Bo is a sought-after speaker and has written numerous articles that have been published in the *NAEPC Journal of Estate & Tax Planning*, *Financial Advisor Magazine*, *Atlanta Business Chronicle*, *Atlanta Journal-Constitution*, *National Underwriter*, *Private Wealth Magazine* and *Business to Business Magazine*.

Bo is actively involved with Covenant House Georgia and Trinity House. He previously served on the board and leadership council for a number of organizations including Songs For Kids Foundation, Camp Sunshine, Curing Kids Cancer and the U.S. Soccer Foundation's Atlanta Chapter.

In his spare time, Bo enjoys spending time with his wife, children and grandson. He enjoys live music, the symphony, playing guitar, long distance running, skiing and is an avid traveler.

The Chartered Financial Consultant® (ChFC®) is a financial planning designation for the financial services industry awarded by the American College. A candidate for the designation must meet the following requirements: complete seven required and two elective courses, possess three years of experience in the financial industry, successfully pass nine closed-book, course-specific, two-hour proctored exams and agree to adhere to The American College's Code of Ethics. After certification, continued use of the designation mandates 30 hours of continuing education every two years and on-going commitment to the ethics and practice standards. The Chartered Advisor in Philanthropy® (CAP®) designation is administered by The American College of Financial Services. To earn the designation, applicants must complete the required coursework, meet minimum experience requirements, follow ethical guidelines, agree to The American College of Financial Services Code of Ethics and Procedures and pay the associated fees. To meet the experience requirements, one of the following must be true for three of the five years prior to applying for the designation: 1.) The advisor offered wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management or services, investment management of charitable assets or accounting services to individuals or charities; OR 2.) The advisor was employed in the nonprofit sector in a role related to nonprofit management, development, planned giving or fundraising. The coursework consists of three classes covering gift planning for families, gift planning for nonprofits and charitable giving strategies. The courses are the equivalent of three semester hours each, for a total of nine semester hours. Each course requires the completion of a two-hour exam, which is administered at a local exam center. Courses are graduate-level and can earn credit toward a Master of Science in Financial Services degree as well as the Chartered Advisor in Philanthropy® designation. The College requires the designation to be completed within five years of completing the relevant coursework. The Chartered Life Underwriter® (CLU®) is a professional designation awarded by The American College of Financial Services to individuals who specialize in life insurance underwriting and estate planning. Candidates are required to complete eight courses, as well as eight examinations. The designation requires 30 hours of continuing education every year. OFG-2511-28