



## LEADERSHIP PROFILE

Tim Wittenbrook is a Managing Director at Oxford Financial Group, Ltd. partnering with ultra-high-net-worth clients to help them achieve their financial and personal planning goals. He advises families and institutions on asset allocation, investment manager selection and fiduciary risk management.

Tim applies his deep understanding of multi-generational wealth planning to design strategies tailored to each client's needs. He emphasizes a collaborative approach to building long-term relationships and supporting clients in achieving their financial goals.

Tim's rich experience stems from his time as an Executive Director at JP Morgan Asset Management. Prior to JP Morgan, he served as Vice President at Fidelity Investments.

### TIM E. WITTENBROOK, CFP® MANAGING DIRECTOR



*"Oxford's commitment to independence and objectivity supports our role as a partner dedicated to clients' best interests. I strive to first understand what truly matters to clients and then work to identify thoughtful strategies to help achieve their goals."*

Tim graduated from Miami University, Farmer School of Business with a bachelor's degree in finance. He went on to become a CERTIFIED FINANCIAL PLANNER™ professional.

Tim and his wife, Michelle, are natives of the Cincinnati area and have five children. They have been involved in a diverse group of charitable organizations and are particularly interested in efforts that benefit youth.

Tim's ability to ensure his clients are well educated and have access to the best solutions, coupled with his depth of expertise, position him as an excellent resource for sophisticated individuals and corporations.

*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](http://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-2511-29*

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