



## LEADERSHIP PROFILE

Neal Davis serves as Managing Director at Oxford Financial Group, Ltd., where he leads client relationships by providing tailored investment advice and integrating Oxford's comprehensive offerings into customized solutions that address each client's unique needs.

Previously, Neal held the role of Vice President and Senior Portfolio Manager in the Private Client Group at Fort Washington Investment Advisors, Inc. There, he oversaw investment strategy, portfolio management and the supervision of assets for ultra-high-net-worth families and institutions. Earlier in his career, Neal spent nine years at Buckingham Advisors as a Senior Portfolio Manager, where he managed client assets, conducted equity research and developed operational efficiencies across the firm.

### NEAL G. DAVIS, CFA, CFP® MANAGING DIRECTOR



*"I believe every client deserves a partner who is fully invested in their success, not just their portfolio. By anticipating needs, uncovering unique opportunities and guiding each decision with transparency and care, I empower clients to reach their goals with confidence and peace of mind."*

Neal earned his Bachelor of Science in Family Financial Management from The Ohio State University. He holds the Chartered Financial Analyst (CFA) designation, is a CERTIFIED FINANCIAL PLANNER (CFP®) certificant and has a Series 65 license.

Dedicated to service beyond his professional responsibilities, Neal is a member of the Cincinnati CFA Society and volunteers with *Adopt A Class* and the *Boys & Girls Club of Cincinnati*, promoting financial literacy among local youth.

Neal resides in Cincinnati with his fiancée, Chelsea, and their French Bulldog, Cookie. He is passionate about travel, is an avid aviation enthusiast who earned his private pilot license and enjoys supporting The Ohio State Buckeyes, cycling, fitness and reading.