



LEADERSHIP PROFILE

Bo Ramsey serves as Co-Managing Partner and Chief Investment Officer for Oxford Financial Group, Ltd. In this role he oversees Oxford's Investment Management Group and the Oxford Investment Fellows® by establishing the long-term investment vision, philosophy and strategies for Oxford's CIO practice, allocating resources amongst the team and sourcing and leading investment opportunities.

Bo is a member of Oxford's Board of Directors. He additionally serves on the Oxford Executive Council, Oxford Investment Board, The Trust Company of Oxford™ Board, the Mayfair Investment Committee and all investment subcommittees.

Bo began his career as an attorney after he earned his Juris Doctor from Indiana University McKinney School of Law, where he graduated *cum laude*. Prior to joining Oxford, Bo served as Co-Chief Investment Officer at Pendyne Capital, LLC where he directly managed alternative investment portfolios, including a \$150 million private equity and venture capital portfolio and an \$80 million hedge fund portfolio. He also

**ROBERT "BO" D. RAMSEY III,
JD, MBA, CFA, CAIA
CO-MANAGING PARTNER &
CHIEF INVESTMENT OFFICER**



"I have a passion for navigating the complexities of the investment world. My desire is to channel my particular expertise in private market investments, including sourcing new opportunities, evaluating management teams and leading due diligence to build alpha-oriented portfolios in order to better serve Oxford's premier clients."

served on the board of directors for three portfolio companies. Prior to his time at Pendyne Capital, Bo was Deputy Chief Investment Officer at Indiana Public Retirement System, where he managed the \$3.5 billion private equity, \$6.3 billion public equity and \$2.7 billion risk parity portfolios.

Bo received his bachelor of science and his master of business administration degrees from Indiana University Kelley School of Business. Bo is a Board Member and Investment Committee Member of the Indianapolis Symphony Orchestra Foundation, an Advisory Board Member of Pacenote Capital, LLC and a Board Member of Top Echelon Software, LLC, IDW, Inc., Tile-Redi, LLC, Baseline Fitness, LLC and publicly traded Stryve, Inc. (NASDAQ: SNAX). Bo is a former Board Member of POLYWOOD, LLC.

Bo and his wife have three children and live in Carmel, Indiana with their dog. His hobbies include running, paddle boarding, golf, reading and travel. He is a fan of Indiana University sports, the Indianapolis Colts and the Chicago Cubs.

The Juris Doctor (JD) is a graduate degree in law. The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. Chartered Financial Analysts® (CFA®) are licensed by the CFA® Institute to use the CFA® mark. CFA® certification requirements: hold a bachelor's degree from an accredited institution or have equivalent education or work experience, successful completion of all three exam levels of the CFA® Program, have 48 months of acceptable professional work experience in the investment decision-making process and fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors. 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. OFG-2512-21