



LEADERSHIP PROFILE

Richard Hall is a Managing Director at Oxford Financial Group, Ltd., where he demonstrates his ability to bring clients specialized solutions to investment goals. Richard focuses on helping individuals by ensuring they are well educated and understood through the process. This understanding helps clients feel confident in their partnership with Oxford.

Richard specializes in investment management, financial planning, estate planning and client service—advising high-net-worth individuals, families and institutions. He brings nearly 26 years of experience serving individuals and families with broad financial planning expertise.

Prior to joining Oxford, Richard was the Investment Director for PNC Bank in its Wealth Management division. Prior to that he served as an investment manager for Standard Federal Bank.

RICHARD V. HALL, MBA, CFP® MANAGING DIRECTOR



“My guiding principle in serving clients is to always speak with integrity, sincerity and honesty. To be impeccable with your words shows strength of character and is exemplified in my commitment to excellence for my clients, family, friends and community.”

Richard is a graduate of Wayne State University with both a bachelor of science and a master of business administration with a focus on investment finance. He is a CERTIFIED FINANCIAL PLANNER™ professional.

Richard is involved in a number of charitable and community endeavors. He and his wife, Christina, live in Greenwood, Indiana with their three children.

Richard aims to make his clients feel confident in the investment planning process and rest easier knowing that they have someone on their team who understands what they are facing and will partner with them to help make their goals a reality.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management.

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), 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-2603-10