LEADERSHIP PROFILE

ASHLEE D. WALTON, CFP®
MANAGING DIRECTOR

"I find my greatest fulfillment in teaching and empowering families, and I value the trust they place in me. Building multigenerational relationships and developing strategies that helps ensure success across generations drives my work."

Ashlee Walton is a Managing Director at Oxford Financial Group, Ltd., where she advises multigenerational families on holistic wealth planning, governance and legacy strategies. She coordinates estate and tax planning, business succession, philanthropic strategy and trust administration, translating complex concepts into clear, actionable plans. She also collaborates with outside counsel, tax advisors and investment professionals to deliver cohesive plans tailored to each family's values.

Previously, Ashlee served as Senior Advisor and Tax Strategist at Goldstone Financial Group, where she developed and maintained client partnerships through relationship-driven growth and client education, and provided comprehensive tax planning and multiyear strategic reviews for high-net-worth clients. Prior to that, she was a Senior Financial Planner at James Investment Research, where she developed the firm's financial planning framework and fee model and served as lead advisor on complex client relationships, integrating tax, estate, retirement, investment and charitable strategies in collaboration with CPAs and attorneys.

Ashlee holds a Bachelor of Science in Financial Services from Wright State University and is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.

A frequent presenter and educator, Ashlee has led seminars and classes on tax planning, retirement strategies and wealth management for clients, professional groups and community organizations. She has also appeared on broadcast and digital platforms and has been quoted in print on personal finance and tax topics.

Ashlee's primary focus is her family. She and her husband and daughter have several pets and enjoy outdoor activities such as Jeep outings, hiking and camping, but they also value quiet time at home. In her spare moments, Ashlee is an avid reader.

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-2604-1