



OXFORD FINANCIAL GROUP, LTD.

OXFORD FINANCIAL GROUP, LTD.™ STRENGTHENS GRAND RAPIDS PRESENCE WITH MANAGING DIRECTOR APPOINTMENT

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Jason Gust brings deep tax planning and family office services expertise to Oxford's Grand Rapids team

CARMEL, INDIANA, August 5, 2026—Oxford Financial Group, Ltd., one of the largest independent RIA firms in the country, has appointed Jason M. Gust, CPA, MST, as a Managing Director and Family Office Fellow in its Grand Rapids, Michigan office. The appointment reinforces Oxford's commitment to the Grand Rapids market and deepens the firm's capacity to deliver comprehensive family office services to ultra-high-net-worth families, multigenerational trusts and business owners across the region.

Gust will lead Oxford's most complex client families on tax and estate planning, wealth preservation, asset protection and capital deployment strategies. He brings a holistic approach to client relationships, helping families navigate generational dynamics, liquidity needs and long-term planning across disciplines including insurance, philanthropy and trust administration.

"Jason's background is a natural fit for the kind of families Oxford serves. He has spent his career inside family offices and complex wealth environments, so he understands the level of coordination these families need," said **Jeffrey H. Thomasson, MBA, CFP®, CEO and Managing Director of Oxford Financial Group, Ltd.** "His combination of hands-on tax expertise and genuine family office experience is the perfect addition to our Grand Rapids team."

Gust joins Oxford from VA Enterprises LLC in Grand Rapids, where he served as Director of Finance, leading tax strategy, treasury functions and wealth operations for an ultra-high-net-worth single-family office. He previously served as Controller at Buttonwood Capital Management LLC, overseeing accounting and compliance for complex multi-entity family structures. Gust also brings foundational public accounting experience from roles at Plante Moran PLLC and Crowe LLP, where he specialized in flow-through and real estate taxation.

Gust holds a Bachelor of Science in Business Administration and Accounting, magna cum laude, from Aquinas College and a Master of Science in Taxation from Grand Valley State University. He is a Certified Public Accountant.

To learn more about Oxford Financial Group and its Grand Rapids team, visit www.ofgltd.com.



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ABOUT OXFORD FINANCIAL GROUP, LTD.

Oxford Financial Group, Ltd.™ is one of the largest independent RIA firms in the country with oversight of more than \$38 billion in assets under advisement* (which includes assets under management). Oxford has 25 Managing Directors** in seven market offices who serve family and institutional clients across the country, with offices in Atlanta, Chicago, Cincinnati, Grand Rapids, Indianapolis, Minneapolis and Palm Beach. Oxford is an independent, fee-only firm that is privately held by its partners, with special expertise in Bespoke Generational Solutions, Aspirational Solutions and Diversifier Strategies. Oxford has provided multigenerational estate planning advice and forward-thinking investment solutions to families and institutions for more than 45 years. To learn more or explore career opportunities at Oxford, visit www.ofgltd.com or our [Careers Page](#).

*As of 12.31.24

**As of 4.1.26

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