



LEADERSHIP PROFILE

James Wright is a Wealth Advisor at Oxford Financial Group, Ltd. With more than 20 years of experience in the financial services industry, James seeks to maintain, deepen and expand relationships with the existing clients and multi-generational families he serves. His responsibilities include all aspects of the financial planning process, including cash flow management, investment management and tax and estate planning.

James originally joined Oxford in 2014 as a Client Service Manager. Along his path of career advancement, James was promoted on multiple occasions, first to the role of Client Relationship Strategist, then to Senior Relationship Manager and on to Client Service Supervisor.

In his prior position as Client Service Supervisor, James oversaw Oxford's team of Relationship Managers, serving as a technical resource to ensure the seamless coordination and implementation of the financial needs and goals of Oxford's clients.

JAMES R. WRIGHT, MBA, CFP®, CMFC® WEALTH ADVISOR



"At Oxford, our clients' best interest is at the heart of what we do every day. With a strong commitment to independence and objective advice, we aim to serve our clients thoughtfully. My focus is dedicated to helping our clients pursue their financial needs and aspirations."

Prior to joining Oxford, James was a financial planner for a fee-only financial planning and investment management firm where he worked closely with high-net-worth clients in all aspects of financial planning and wealth management.

James holds a CERTIFIED FINANCIAL PLANNER™ designation as well as a Chartered Mutual Fund CounselorSM (CMFC®) designation.

James earned a Bachelor of Science degree in Finance with a concentration in Financial Planning and minor in Insurance from Ball State University. He received his Master of Business Administration from Ball State University's Miller College of Business.

James and his wife live in north Indianapolis with their two sons. They enjoy sports, spending time with family and being outdoors.

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. The Chartered Mutual Fund CounselorSM (CMFC®) is awarded by the College for Financial Planning to professional mutual fund advisers who complete a self-study course followed by a final examination. The designation requires 16 hours of continuing education every two years. OFG-2608-10
