OXFORD FINANCIAL GROUP, LTD.

OXFORD FINANCIAL GROUP EXPANDS NEW YORK PRESENCE WITH MANAGING DIRECTOR APPOINTMENT

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Former Goldman Sachs Private Wealth Advisor Eric D. Lipkind joins Oxford to serve ultra-high-net-worth families in the New York market

NEW YORK, November 5, 2026—Oxford Financial Group, Ltd., one of the largest independent RIA firms in the country, has appointed Eric D. Lipkind, MBA, as a Managing Director based in New York. The hire reflects Oxford's continued growth in New York, a market where ultra-high-net-worth families frequently navigate the intersection of significant investments, business interests and complex estates. Eric brings firsthand experience in this space and a deep knowledge of the New York market.

Lipkind will partner with families to help reduce complexity by integrating investment management with estate coordination, tax strategy, insurance oversight and administrative infrastructure. Drawing on best practices from prominent families, he helps clients articulate the purpose of their wealth and build durable frameworks that promote family harmony and prepare the next generation.

"Over the last 15 years, we have been building in New York with intention, bringing on experienced professionals who can handle the complex needs of the families we serve." said **Jeffrey H. Thomasson, MBA, CFP®, CEO and Managing Director of Oxford Financial Group, Ltd.** "Eric has worked alongside families with significant wealth in this city for years, and he shares our belief that a relationship with a family should outlast any one generation."

Oxford's New York presence extends beyond Lipkind's appointment. Thomasson and Co-Managing Partner Kristina Baron are among seven Managing Directors who have served the market on a regular basis and will continue to do so.

Before joining Oxford, Lipkind was a Private Wealth Advisor at Goldman Sachs in New York City, where he led a team focused on ultra-high-net-worth families and select institutions. Earlier in his career, he worked in sales and analytics at Bloomberg, covering leading sell-side institutions and helping develop go-to-market strategies for the firm's salesforce.

Lipkind holds a Master of Business Administration with a focus in Quantitative Finance from New York University's Stern School of Business and a bachelor's degree in finance from Tulane University. He is a member of the NYU Stern Alumni Council, served as president of the Tulane University Alumni Club of New York City and received Tulane's Robert V. Tessaro Young Alumni Volunteer Award. He also co-founded a nonprofit that delivered equipment to New Orleans emergency responders during the COVID-19 outbreak.

To learn more about Oxford Financial Group, visit www.ofgltd.com.

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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 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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