



FINANCIAL GROUP, LTD™

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Providing Private Firm Attention With Large Enterprise Reach

Our Firm

The sole commitment of Oxford is to enhance the financial lives and enrich the family legacies of our clients by offering a full range of services tailored to each client's needs. Broadly, we provide investment, financial, wealth transfer, fiduciary and concierge-like services, so our families benefit from an integrated wealth management solution. Our clients work with a dedicated advisor – a partner in the firm – who leads a team passionately committed to their success. We develop a shared vision for each family, with short-term and long-term goals, strategies and recommendations to achieve their objectives.

Our Unique Features

Oxford has no products and no affiliations or financial arrangements with third parties that might present conflicts of interest. Being privately held enables us to take an independent, unbiased view – focusing on each client's needs and priorities. The result is powerful: the personal attention and objectivity of a private firm, with the reach and resources of a large enterprise. Our guiding principle is to ensure our advice is always in the best interest of our clients and families. We have created an ownership succession plan to ensure we remain independent for many generations and our guiding principle is never compromised.

Our Strengths

Our key strength is our people. Oxford's experienced, thoughtful, and compassionate professionals include advisors and financial, tax, and investment research teams. Our deep resources and comprehensive capabilities, built nearly 30 years ago, provide complex and integrated wealth-management solutions to multi-generational families, all backed by impeccable service. We create ways for clients to access planning and investment opportunities they otherwise might not be able to take advantage of on their own. Everything is customized to each client; there are no model portfolios or cookie-cutter approaches.

AT A GLANCE

Contact: Jeffrey H. Thomasson, CFP, CEO and Managing Director, jthomasson@ofgltd.com

Locations: Indianapolis, Chicago and Cincinnati, serving clients in 33 states

Year Founded: 1981

Total Assets Under Advisement: Over \$13B

Our Typical Client

Our typical clients value true independence. They are affluent families with a multi-generational focus, including current and prior business owners, executives, and those who inherited their wealth. The families Oxford serves often cite our conflict-free advisory model and depth of talented professionals as two key reasons they hired Oxford.

Little-Known Facts About Our Firm

Oxford was conceived 30 years ago by Jeff Thomasson during his graduate studies at the Indiana University Kelley School of Business, where he specialized in investments and taxation. While working on his graduate project, he realized many wealth management firms had conflicts of interest and were advising clients to select financial products with commissions and hidden fees that benefitted wealth managers over clients. So, Oxford was born as an independent, fee-only wealth advisory firm and is considered a forerunner and current leader among multi-family offices. Oxford has an irrevocable succession plan, meaning we'll remain private, independent and transparent indefinitely.