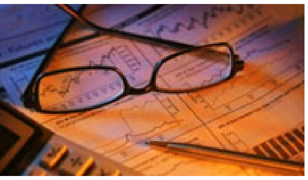

Our Services

Oxford Asset Management is an investment advisory firm specializing in financial planning and retirement planning.

More Info

Comprehensive Financial and Retirement Planning

OXFORD Wealth Advisors is a team of full-service financial planning and wealth management professionals. We partner with our clients to help them on their journey to financial peace of mind, providing a variety of services which include financial planning, investment management, tax and business services, estate planning, insurance, and philanthropic counsel. We have a 22 year history of delivering financial counsel based on applying biblical wisdom with a "higher perspective". Our advice is based on a fee-only business model allowing our advisors to offer objective recommendations so that our clients can make informed decisions. With offices in Colorado, and Texas, we serve over 900 clients across several states. Our advisors share a dedication to see our clients free to pursue the things in life that matter most to them.

Our Story Oxford provides investment and wealth management services through experienced financial advisors who cultivate relationships and utilize resources such as financial planning software, investment vehicles, and tax planning strategies to help clients achieve their goals.

But it's our *values* that set us apart from other wealth management firms. It is what motivates us and gives purpose to that excellence for which we strive.

We are more than a financial planning, investment management, and estate planning firm. We strive to do all of those things eminently well , however, inspired by authors and educators like Dave Ramsey and the late Larry Burkett, we have purposed to transcend the ordinary and help people achieve financial peace of mind. And as you find peace of mind about money – without anxiety, conflict, or fear – your life will be filled with purpose and be more satisfying--allowing you to focus on what matters most.

The goal of helping people find and reach their goals and live above material things alone--for a higher purpose was one of the cornerstones on which Jim Palumbo established the company in 1995. Jim felt called to help people become better stewards of their money and resources and have a better relationship with money by using not just technical expertise, but classical wisdom as well. For over 20 years, many of our clients have come to us, and they stay with us, because they are attracted to our uncommon approach to wealth management. Call today and learn more about how we integrate this classical wisdom into our counsel.

Financial Planning

OXFORD WEALTH ADVISORS

investing plays an important role in the overall stewardship process to help individuals provide for their families, focus on those things that are important, and to be generous. Our advisors work to help clients grow their investments to meet their personal financial goals. Our method of investing provides intelligent solutions to complex problems, underpinned by the ethics and values that matter most to all of us.

More Info

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Jim Palumbo is a Principal and an Investment Advisor Representative, and Steve Pease, Dave Smiley, Scott Rader, and Joe Longoria are Investment Advisor Representatives with Dynamic Wealth Advisors dba Oxford Wealth Advisors. All investment advisory services are offered through Dynamic Wealth Advisors. A copy of Dynamic Wealth Advisors' ADV Part 2A Firm Brochure is available upon written request and can also be found on the Securities and Exchange Commission website at https://adviserinfo.sec.gov/IAPD *by searching under crd #151367.*

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Ph. (866) 56-Money (866 566 6639)

Contact us, for a free initial consultation.

Name*

Phone

Email*

Office - Select Nearest Location -

Comments*

Spam protection question: What is three plus two?

Send