THOUGHTFUL, INSIGHTFUL, COMMITTED.

Leadership

Chief Investment Officer

Services

Welcome to Oxford Financial Group, Ltd.

Oxford Financial Group, Ltd.™ is the premier multi-family office in the Midwest and has been named the #1 Registered Investment Advisor (RIA) by Financial Planning magazine for each of the last five years (based upon assets under management). One of the largest independent RIA firms in the country with oversight of approximately $23.5 billion in assets under advisement (which includes assets under management), Oxford has 21 Managing Directors in five market offices who serve over 700 family and institutional clients in 37 states. Oxford is an independent, fee-only firm that is privately held by its partners and has provided multi-generational estate planning advice and forward-thinking investment solutions to families and institutions for more than 36 years. With special expertise in Aspirational Solutions and Niche Growth Strategies, Oxford specializes in serving clients with net worth above $5 million.

Location, Location…Kilowatts?

Advances in technology have also created important new growth opportunities for the real asset strategies in which Oxford clients invest.

Read the Investment *e.*Perspective

Peace, Preservation and Passing Down Property

A family vacation home is a unique asset that deserves suitable planning for decision-making and managing transitions within the family.

Read the *e.*Insight

2019 Annual Report

We BELIEVE that more is always possible, and we are focused and will continue to focus on providing you the bespoke service and innovative solutions you have come to expect.

Read the Annual Report