



FINANCIAL GROUP, LTD™

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**FOR IMMEDIATE RELEASE**

## **Oxford Financial Group Acquires Crowe Wealth Management: Will Maintain Office in Grand Rapids**

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Indianapolis, Ind., January 24, 2011—Oxford Financial Group, Ltd.<sup>™</sup>, has acquired Crowe Wealth Management. Crowe Wealth Management was formed in 2003 as a joint venture between Oxford and Crowe Horwath LLP, as a means of offering Crowe's existing clients access to Oxford's investment advisory services. Oxford completed the acquisition of the remaining stake in Crowe Wealth Management on January 14, 2011 and all personnel and clients have merged into Oxford's Indianapolis and Chicago offices. The former Crowe Wealth Management personnel in Grand Rapids, Michigan will continue to operate from their existing location until their move into a new Oxford location.

According to Jason Brinks, director in the Grand Rapids office, "We've been successful in building our practice in West Michigan over the last decade and we see great potential in the region going forward. Our plan includes investing additional resources in this market with the opening of a new and expanded Oxford office in downtown Grand Rapids which will accommodate the planned growth of our advisor team serving the region."

"We believe the acquisition of Crowe Wealth Management provides tremendous benefits to clients by gaining access to a broader team of investment advisory personnel and a more streamlined delivery of the outstanding counsel and service they already receive," said Jeffrey Thomasson, CEO & managing director of Oxford Financial Group, Ltd.<sup>™</sup>.

All clients will continue to be serviced by their existing client relationship directors. The merge has brought another \$1 billion in assets and an additional 60 individual, family and institutional clients to Oxford, which is already one of the largest registered investment advisory firms in the country.

### **About Oxford Financial Group**

Oxford Financial Group, Ltd.<sup>™</sup>, is the premier multifamily office in the Midwest and one of the largest Registered Investment Advisor (RIA) firms in the country, with oversight of more than \$13 billion in assets (which includes assets under management) for approximately 550 clients in 34 states. An independent, fee-only firm providing families and institutions generational estate planning advice and forward-thinking investment strategies for over 25 years, it has special expertise in alternative investments with emphasis on hedge funds and private equity. Headquartered in Indianapolis, Indiana with offices in Grand Rapids, Michigan, Chicago, Illinois, and Cincinnati and Dublin, Ohio, Oxford specializes in serving clients with portfolios greater than \$2 million and a net worth above \$5 million. Oxford also provides trust and custody services to its clients through The Trust Company of Oxford<sup>™</sup>. For additional information, call 317. 843.5678, 800.722.2289 or visit [www.ofglt.com](http://www.ofglt.com).

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