



FINANCIAL GROUP, LTD™
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Lowry Hill Partners Join Oxford Financial Group, Ltd.™ in Minneapolis and Chicago Offices

Indianapolis, Ind.—September 13, 2011—Five wealth management professionals have joined Oxford Financial Group Ltd., in the firm’s Minneapolis and Chicago offices. In their roles with Oxford, they will serve existing clients and develop new client relationships. All have recently worked for the Minneapolis-based firm, Lowry Hill.

Laura Clark, Thomas Gunderson, Cameron Johnson, Kathleen Kuehl, and Kristine Merta bring a great depth of experience in wealth management, generational estate and tax planning, and investment strategy to Oxford’s Twin Cities and Chicago territories.

“We are very excited to continue to build the Oxford brand in these markets. Oxford truly knows how to put the client first which was of utmost importance to us when making the decision to join the firm,” said Merta. “As an independent firm with more than \$16 billion under advisement, they can commit the necessary resources to their financial and investment platforms.”

Kuehl added, “Oxford is a great firm and we are honored to work with a collection of colleagues who are experienced and have the intellectual capital to stay ahead of these challenging times.”

Laura J. Clark, CFA, has over 25 years of finance experience, including corporate advisory work, stock selection and private client portfolio management. Clark began her career at J.P. Morgan, where she held a variety of positions and has been serving private clients in the Chicago area for 13 years. As a CFA charter holder, she is a member of the CFA Institute and CFA Society of Chicago. She holds an MLA degree from the University of Chicago and a BS degree from Cornell University. Clark worked in Lowry Hill’s Chicago office for over 5 years and joins Oxford’s Chicago office on Michigan Avenue as a Director.

Thomas A. Gunderson, MBA, CFA, is an investment strategist with over 15 years of experience in successfully leading institutional portfolio strategies. Gunderson earned an MBA from the University of Michigan Ross School of Business, and graduated with honors from St. Olaf College. He is a member of the Twin Cities Society of Securities Analyst and serves on the board of the Children’s Cancer Research Fund and Downtown YMCA. Gunderson worked for Lowry Hill for over 5 years and joins Oxford in Minneapolis as a Senior Investment Strategist.

Cameron R. Johnson, MBA, CFA, is an investment strategist with expertise in portfolio management for small cap equity strategy. He earned his MBA from the University of Notre Dame and earned his BA from Gustavus Adolphus. He has made editorial contributions to the *Wall Street Transcript* and is a member of the Twin Cities Society of Security Analysts. Johnson worked for almost 9 years at Lowry Hill and will also serve Oxford clients in the Twin Cities area as a Senior Investment Strategist.

Kathleen L. Kuehl, JD, is an attorney who practiced law for nine years with concentration in estate planning, probate and trust law. Her experiences in the financial services industry includes tax, estate and financial planning, and relationship management. Kuehl received her JD from the University of Minnesota Law School and her BA from Winona State University. She most recently worked for J.P. Morgan in their Private Wealth Management Group in Minneapolis, and is a member of the Minnesota State and Hennepin County Bar Associations. Kuehl left Lowry Hill in April of 2011 after almost 11 years with the firm. She will serve Oxford clients as a Director in its Minneapolis office.

Kristine J. Merta, LLM, JD, is also an attorney and specializes in tax and estate planning. In addition to serving clients, Merta is also a frequent lecturer on various estate planning topics and is an active member of the American, Minnesota State, and Hennepin County Bar Associations. She is a graduate of both Arizona State University and William Mitchell College of Law. Merta worked for Lowry Hill for 14 years and will serve Oxford's Twin Cities clients as a Director.

"We are thrilled to welcome such highly talented professionals to our team," said Jeffrey H. Thomasson, Oxford's CEO and Managing Director. "Our clients have always appreciated our Midwest values and global reach. These new developments will enhance the service we provide to our clients in the Twin Cities and Chicago."

About Oxford Financial Group

Oxford Financial Group, Ltd.TM, 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 \$16 billion in assets (which includes assets under management) for over 500 families and institutions in 35 states. An independent, fee-only firm providing families and institutions generational estate planning advice and forward-thinking investment strategies for over 30 years, it has special expertise in alternative investments with emphasis on hedge funds and private equity.

With offices in Indianapolis, Chicago, Cincinnati, Grand Rapids and Minneapolis, Oxford specializes in serving clients with net worths above \$5 million. Oxford also provides trust and custody services to its clients through The Trust Company of OxfordTM. Oxford is ranked #1 in AdvisorOne's 2011 Top Wealth Manager Ranking, and Bloomberg Markets Magazine named the firm #3 in its Top Firms by Asset Growth. For additional information, call 800.722.2289, or visit www.ofgltd.com.

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