

# Whos Who in Banking and Finance - 2011 | 2011-04-02 | Indianapolis Business Journal | IBJ.com

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Every business sector has influential players, whether they are in the public eye or wield their influence behind the scenes. In a monthly feature that runs in the first issue of the month through October, *IBJ* is identifying those people in eight different categories.

This is the second installment in the series and features women and men who are key members of the city's banking and finance sector. They include bankers, fund managers, venture capitalists, lawyers, financial planners and others who influence the movement and availability of money in the local economy. The names come from our own news staff, peer recommendations and public nominations—a long list, which was peer reviewed and culled to create the list that follows.



**Michael A. Rosen, 41**  
*Managing Director of Private Equity*  
*Oxford Financial Group*

Mike Rosen became Carmel-based Oxford Financial Group's first managing director of private equity in 2005. The role was created in direct response to increasing market need and client expectations for private-equity investment options—more specifically, direct private-equity investments.

Rosen chairs the group's Mayfair Investment Committee. The company's Mayfair initiative focuses on creating direct private-equity vehicles, primarily in the form of limited-liability companies for high-end investment opportunities.

Before joining Oxford, Rosen served as managing director of Hillenbrand Capital Partners, where he was responsible for leading projects to analyze, invest in and monitor privately held companies and investment partnerships, as well as issues related to more liquid investment. Earlier he had been associate director of the mergers and acquisitions group of Banc One Capital Markets Inc., where he focused on advising middle-market companies on a variety of growth and liquidity opportunities.

Rosen is a graduate of Butler University, where he earned his bachelor's in business administration; he received his master's from the University of Notre Dame. He is a board member of the Association for Corporate Growth and a judge for the Real Business Experience program at Butler's College of Business. He coaches youth sports and lives in Carmel with his wife, two sons and daughter.



**Jeffrey H. Thomasson, 52**  
*CEO and Managing Director*  
*Oxford Financial Group Ltd.*

Jeff Thomasson founded Carmel's Oxford Financial Group Ltd. as a sole proprietorship in 1981, right out of school. He incorporated Oxford in 1983. Today it is a registered investment advisory firm, with oversight of more than \$15 billion in assets for approximately 700 clients in 35 states. Focused on success for his firm and its clientele, Thomasson devotes a significant amount of his time and expertise to the coordination and overall strategic direction of the firm.

Thomasson earned his undergraduate degree from Ball State University and then entered Indiana University's School of Business, where he specialized in investments and taxation and was named outstanding MBA. He obtained his Certified Financial Planner designation through post-graduate

study. In 2000, he received the Indiana University Kelley School of Business Distinguished Entrepreneur Award.

Beyond his work with Oxford, Thomasson enjoys his involvement with charitable organizations, as well as being a member of the Young Presidents' Organization, World Presidents' Organization and Chief Executives Organization. He sits on the boards of Ontario Systems in Muncie and Parkway Co. in Cincinnati. He has previously served on the boards of the Leadership Network, Union Federal Bank, Waterfield Mortgage Corp. and the Hudson Institute.

Through the Thomasson Foundation, he and his family have awarded hundreds of scholarships to students who are children of missionary families around the world.