



**Press/Analyst Contacts**

**Public Relations Contact:**

Katie Abernathy  
Oxford Financial Group, Ltd.  
317-805-5017  
kabernathy@ofgltd.com

**FOR IMMEDIATE RELEASE**

**Oxford Financial Group Recognized by Worth Magazine  
Jeffrey H. Thomasson Named to List of Top 100 Financial Advisors**

---

**INDIANAPOLIS, Ind.—September 29, 2006** – Oxford Financial Group, Ltd. announced today that its CEO and Managing Director, Jeffrey H. Thomasson, CFP® was named one of the “Top 100 Wealth Advisors” in the nation by Worth Magazine. The list, designed to identify and recognize the top wealth management executives throughout the country, appears in Worth’s October 2006 issue. Thomasson was the only wealth advisor representing Indiana on this year’s list and Oxford Financial Group was one of only 14 Midwest-based wealth advisement firms represented.

In selecting the 100 Wealth Advisors, Worth editors put each candidate through an extensive survey process that assessed each advisor’s educational credentials, compensation structure, client retention rate, outlook on the investment climate and model portfolio returns. Additional factors such as professional histories and professional designations were also taken into consideration.

“This list results from extensive research and analysis. We recognize those who have earned this distinction for their outstanding expertise, insight, trustworthiness and commitment to their clients’ needs,” said Dwight Cass, Editor-in-Chief of Worth.

“It is, indeed, an honor to be recognized by Worth Magazine,” said Jeffrey H. Thomasson. “My colleagues and I take great pride in offering our clients the highest level of personal service, and I believe this is reflected by our firm’s inclusion in Worth’s Top 100 listing.”

Oxford Financial Group, Ltd. was founded by Thomasson in 1981 with the goal of serving as a significant partner to high net worth families, individuals and institutions. Before forming Oxford Financial Group, Ltd., Thomasson completed his education at Indiana University, where he received an MBA in investments and taxation from the Kelley School of Business. He obtained the Certified Financial Planner® designation through postgraduate study in the fields of investment, insurance, and retirement and estate planning. In 2000, Thomasson received the Indiana University Kelley School of Business Distinguished Entrepreneur Award.

**Page 2 of 2**  
**Oxford Financial Group Recognized by Worth Magazine**

Thomasson is actively involved in a number of private foundations. Through the Thomasson Foundation, Jeff and his family have awarded hundreds of scholarships to deserving students who are children of missionary families around the world.

**About Oxford Financial Group, Ltd.**

Oxford Financial Group, Ltd. has been providing quality and completely 100 percent open architecture, fee-only financial advice to significant families and institutions throughout the Midwest and beyond for more than 25 years. Oxford differentiates itself by not being affiliated with banks, brokers/dealers or insurance company products. We are committed to remaining independent/privately owned. Oxford's service offerings include Family Office Services, Investment Services and Trust Company.

Oxford has special expertise in the alternative investment space with emphasis on hedge fund and private equity investments. Oxford's alternative investment strategies provide clients unique access to individual private placement opportunities and options when building highly diversified portfolios.

Oxford's Multi-Family Office brings clarity to its clients' financial affairs by providing in-depth analysis and review of investment and estate planning needs, cash flow and investments. Oxford provides personalized, customized planning, as its services are driven by each individual family's needs, desires and circumstances.

Headquartered in Indianapolis, Indiana, Oxford presently advises on more than \$14 billion in assets. Oxford's 100 associates serve clients in 26 states, with a heavy concentration in the Midwest including approximately 450 family office clients and 90 institutional clients.

###