



Leadership Profile

David A. Graham, MBA Managing Director



David Graham is a Managing Director with Oxford Financial Group, Ltd. Prior to making the transition to Oxford in 2011, David was the managing executive at Crowe Wealth Management, a joint venture between Oxford and Crowe Horwath, LLP. He has extensive experience in wealth management, as both a leader and a practitioner, covering multiple facets of the financial services industry. This includes experience with investments, trusts, non-profit institutions, brokerage and private banking.

Prior to joining Crowe Wealth Management, David was a senior vice president and market executive in the wealth management unit at one of the largest banks in the United States. He led the company's integrated wealth management unit in Northern Indiana. In this role, David oversaw a team of professionals responsible for delivery of investment, trust, financial planning, brokerage and private banking services to both individual and institutional clients.

David is a graduate of Indiana University's Kelley School of Business, where he earned a bachelor's degree in business, with a double concentration in finance and real estate, as well as a master's degree in business administration. Prior to earning his MBA, David worked in the offices of United States Senators Richard Lugar and Dan Coats, advising the senators on issues important to the State of Indiana.

David is a member of the Englishton Park Children's Program Board of Directors where he serves as treasurer.

"I take pride in knowing we offer such great service to our clients. We work hard to provide the best advice possible and tailor it in a way that is specific to each individual's unique needs and goals. In my experience, the coordination of such a wide breadth of professional financial services is unmatched in the industry."