



# Leadership Profile

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David L. Hecht, CPA, CFP®  
Managing Director



David Hecht is a Managing Director at Oxford Financial Group, Ltd. In addition to his role in the Family Office Services group, he is also a shareholder and member of the firm's Investment Policy Committee. David assists clients with matters such as estate and charitable planning, as well as ongoing financial planning matters.

Before joining Oxford in 2002, David spent nine years with a Big Five accounting firm providing personal financial and tax planning services to executives, individuals of significant wealth, and closely held businesses. In this role, he developed strong tax technical skills, particularly in areas such as individual taxation, estate and gift taxation, and the taxation of owners of S-corporations and partnerships.

David is a graduate of the Indiana University Kelley School of Business with baccalaureate degrees in accounting and finance. He continues to maintain his certification as a Certified Public Accountant (CPA). He is also a Certified Financial Planner (CFP®).

David has been active in his community serving as a board member for a number of not-for-profit organizations.

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*“Having a trusted advisor is often the difference between having a plan where financial goals and objectives are accomplished, and one where they’re not. That trust only comes from people of integrity, working hard every day in an objective and independent manner.”*