



Leadership Profile

Michael S. McHugh, CEPA, CPA (Inactive) Managing Director



As a Managing Director at Oxford Financial Group, Ltd., Mike McHugh uses his skills to serve institutional, family and trust clients, focusing primarily on investment issues. He has more than three decades of experience in the area of financial services, and his career has spanned trust and estate planning, financial consulting for closely held businesses and individuals, and investment management. Mike also has extensive experience in working with financial and estate planning for people with disabilities.

Mike is a key member of the client relationship team dedicated to expanding Oxford's services in the Midwest. As a shareholder, Mike is involved in the management decisions of the firm and works with institutional, not-for-profit and high net worth clients.

Mike graduated from California State Polytechnic University in Southern California with a bachelor's degree in accounting. He obtained his Certified Public Accountant (CPA) certification while working at Price Waterhouse and Company, a national public accounting firm.

He later established and maintained his own firm, which was sold to a national public accounting firm before Mike's return to the Midwest in 1986. Prior to joining Oxford, Mike was with a nationally known Wall Street investment research and management firm, where he served as a vice president and financial advisor for more than 200 of the firm's clients.

In November of 2011, Mike earned the Certified Exit Planning Advisor (CEPA) credential from the Exit Planning Institute.

Mike has served as a volunteer, officer and director for various charitable organizations supporting the disabled. In addition, he has been a frequent speaker at events for the disabled and his views on special needs trusts have been published.

"I feel commitment to excellence is the key to success both personally and professionally. This, combined with the integrity and extensive expertise that Oxford brings to our clients, is a winning combination."