Find the right financial advisor at Oxford Harriman & Co.

Stephanie Angelyn Casola | Sponsored by Oxford Harriman & Co.

Oxford Harriman & Co. may be a new name in wealth management for metro Detroit, but the Cleveland-based practice has already solidly established itself nationally across the East Coast.

The company initially opened the doors to its Michigan office in 2019 and is growing steadily. By October 1, 2020 Oxford Harriman partners Albert Berger, Michael Finkelstein and David Gallina will move from Troy to a new, larger location at 2550 S. Telegraph Road in Bloomfield Hills.

The new location will offer more capacity to handle the Company's growing client base. Oxford Harriman will also be looking to add financial advisors to their team over the next two years to manage this growth.

What's behind the steady success?

"We care more about preserving your money than anyone who doesn't share your last name," Finkelstein says. And he means it. He views himself as a conduit to help you achieve your financial goals. "As independent advisers, we pride ourselves on providing comprehensive investment solutions that are in the best interests of our clients rather than promoting product sales," Finkelstein says. "We won't sell you something or make an investment that you don't need or understand."

"Financial management and investment decisions can be complex and we strive to simplify how people save and plan." He goes on to say "Our clients work very hard for their money and we are highly focused on finding ways to save and invest efficiently in addition to preserving their assets."

Likewise, Berger finds it rewarding to guide people as they accumulate wealth or prepare for retirement.

"My family emigrated from the Soviet Union in 1974. They are hard-working people and good savers, but, at that time, did not have a relationship with a trusted advisor to steer them toward a productive investment strategy. These are the type of people I want to help."

Oxford Harriman specializes in investment management, investment planning, retirement guidance, college savings strategies and insurance products. By having professionals in seven offices with a wide variety of experience, advisors have the distinct ability to consult a team member to find the best solution for their clients.

When clients choose to work with Oxford Harriman they receive access to professionals with varied and complementary experience in wealth management. "The team approach gives our clients the ability to reach an associate to address an issue or help with an order at all times," Gallina says.

Berger earned his bachelor's degree in finance from Michigan State University and his MBA from Wayne State University. He is a CERTIFIED FINANCIAL PLANNER ™ professional with 15 years of experience. Finkelstein received his bachelor's degree in accounting as well as his MBA from the University of Michigan. He was formerly a CPA and is a Chartered Financial Analyst with 20 years of experience managing stock portfolios for individuals and institutions. Gallina is a specialist in corporate retirement plans and investment planning with 30 years of proven experience. He was also a branch manager for several investment institutions before becoming an independent advisor.

Collectively, the team has an expansive base of industry credentials. However, Finkelstein notes "What truly matters is our years of experience and how we treat our clients. New clients can expect to find that we take a holistic approach to their financial situation. We coordinate all aspects of investment planning such as allocation strategies, tax-efficient investing, estate planning, and insurance to make sure all of your needs are addressed. Our goal is for you to understand and have confidence in the plan we have developed with you." While Berger admits that any time is a good time to begin working with a trusted financial advisor, the challenges brought forth in 2020 make it particularly important today.

"Now, people are reconsidering their priorities in life and what's important to them", he says. "They may want to adjust that retirement date or build their dream home. There are numerous reasons to work with a financial advisor. At Oxford Harriman, we recognize investment planning is a dynamic process which is why we meet and communicate with our clients often."

Finkelstein adds: "We serve an important role, and the current market volatility — along with the uncertain economic outlook and changing regulations — have highlighted this need."

More people than ever are reaching out for financial advice at this time.

"I tell my clients to think of their family as a business," says Berger. "They are the CEO and we serve as the CFO, here to help you execute your plans. Things change all the time. Whether it's a new career, retirement, or another significant life event people are emotional about their money. We are here to offer independent, third-party counsel and make sure decisions are made with the proper long term perspective."

Oxford Harriman provides comprehensive wealth management services customized to your needs.