

## Kent W. Whitaker, CFA® President



### Oxford Harriman & Company

#### New York City Office

230 Park Avenue, 3rd Floor West  
New York, New York 10169

#### Cleveland Office

3201 Enterprise Parkway, Suite 400  
Beachwood, Ohio 44122

#### Astoria Office

2408 32nd Street, Suite 1002C  
Astoria, NY 11102

#### Detroit Office

2550 S. Telegraph, Suite 114  
Bloomfield Hills, MI 48302

#### Mentor Office

8039 Broadmoor Road, Suite 12  
Mentor, OH 44060

#### New Jersey Office

50 Tice Boulevard, Suite 340  
Woodcliff Lake, NJ 07677

#### Saratoga County Office

282 Ushers Road  
Clifton Park, NY 12065

#### Sarasota Office

1962 Main Street  
Sarasota, FL 34236  
*by appointment only*

[www.oxfordharriman.com](http://www.oxfordharriman.com)

Kent Whitaker is the President of Oxford Harriman & Company and a member of the practice's Investment Policy Committee.

Kent has over 30 years of experience in the financial services industry. Kent began his career in 1989 as a Financial Advisor with Merrill Lynch & Co in New York City. In 1992, he entered the Management Training Program at Smith Barney, where he was involved in sales and branch management for 12 years. In 2007, Kent transitioned to the independent advisor space joining LPL Financial as a Divisional Director.

Kent joined Wells Fargo Advisors Financial Network (WFAFN) in 2010 as a Regional Director in New England overseeing advisor recruiting and business-owner relations. Most recently, prior to joining Oxford Harriman & Company, Kent was a Senior Vice President and Divisional Director for WFAFN in the Northeast. In this role, Kent's responsibilities included consulting on the

advantages and mechanics of starting an independent practice, directing the overall efforts toward successful transitions to ownership; guiding business owners on ways to run and grow their practices to enhance profitability and optimize business valuation; assisting with retirement and succession planning; and serving as an overall strategic resource for business owners.

Kent earned a bachelor's degree from Purdue University and holds the Chartered Financial Analyst® (CFA®) designation.

A native of Boston, Kent resides in New York City. Kent is an accomplished musician, and enjoys spending time with his family, golf, and travel.

### ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. We chose to partner with Wells Fargo Advisors Financial Network because they offer a variety of resources available to our clients including access to industry research, technology and world class products. Together, we are able to offer a full-service platform with comprehensive wealth management strategies, including access to lending services through Wells Fargo affiliates.

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