

Greg Perram, CFP® Managing Director & Partner



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Greg Perram is a Managing Director & Partner with Oxford Harriman & Company in the Chagrin Falls, Ohio office.

Greg most recently was a First Vice President with UBS. He has over 25 years of experience in the financial services industry serving as a relationship manager, investment planner, private banker, and financial advisor. He has also held positions at MAI Capital Management, PNC Wealth Management, and Fifth Third Private Bank.

Greg delivers value-added advice around investment management, brokerage, risk mitigation, and wealth planning for his clients. He serves as his client's trusted financial advisor, and provides advice and counsel to entrepreneurs, high-net-worth-families, and institutions. He offers a comprehensive investment solution that is tailored for the unique needs of each client. Greg is passionate about delivering exceptional client service at a time/place that is at the client's convenience.

Greg earned the CERTIFIED FINANCIAL PLANNER® certification. The CFP® certification identifies those individuals who have met the rigorous experience and ethical requirements of the CFP Board of

Standards and have successfully completed coursework on financial topics in the following areas: general principles of financial strategies, insurance planning, risk management, employee benefits planning, and retirement and estate planning strategies. CFP® practitioners also agree to meet ongoing continuing education requirements and are held to a higher standard.

Greg graduated with his undergraduate degree from Ohio University, and his MBA from Case Western Reserve University's Weatherhead School of Management.

Greg was Treasurer and board member at New Directions Crossroads; an adolescent drug and alcohol rehabilitation/treatment center located in Pepper Pike, Ohio. He held the position of President and was board member of the Gilmour Academy Men's Club. Greg believes in volunteering his time and through his Jesuit educational experience strives to be "a man for others".

A Northeast Ohio Native, Greg lives in Willoughby Hills, Ohio with his wife and three children. He enjoys spending time with his family, traveling, and working out.

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