Robert Frenkel, CFP®

Senior Managing Director & Partner, Chief Investment Officer

Park Avenue Office

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

New Jersey Office

45 Northern Drive
Short Hills, NJ 07078

Robert is a Senior Managing Director and the Chief Investment Officer (CIO) of Oxford Harriman & Company. As the CIO, Rob leads the Investment Policy Committee (IPC) where, along with other members of the team, he develops well-organized investment strategies. He uses his vast experience to develop asset allocation strategies as well as ongoing tactical asset allocation ideas for the practice.

In addition to his CIO responsibilities, Rob uses a sophisticated approach for his individual clientele. Rob's clients tend to lead incredibly busy lives and are usually the driving force behind very large matters. They tend to be founders or top executives of private equity firms, real estate developers, partners at elite law firms, and entrepreneurs. These clients come to Rob as already financially successful people seeking his expertise and focus on helping them prudently grow as well as protect the wealth they have created.

Rob says, "What I do for my clients on a day-to-day basis it is like solving a series of puzzles with a lot of different pieces." Rob views himself as a steward of each of his clients' financial lives. He works with each client to devise their own unique strategy and plan to suit their individual needs. He does not apply a cookie-cutter approach. His focused and objective processes enable him to deliver highly customized solutions to prepare for life's anticipated and unexpected moments. Rob is dedicated to connecting with all his clients on a deeper level. This approach allows him to really get to know his clients.

Rob says, "I live with each of my clients in the moment so I can pivot to what you need for your financial future. I do this by listening to what you really want so I can tailor the solutions to your short-term and long-term needs. By addressing the financial AND the emotional aspects of your finances, my approach enables you to live your life to the fullest."

For over 25 years, Rob's comprehensive approach of examining every element of his clients' financial lives has helped his clients create, build, and preserve their wealth. Rob's clients rely on his extensive knowledge and abilities to:

- Help them meet short and long-term goals.
- Help them make informed decisions on complex matters.
- Review and advise on their investments to work toward financial longevity.

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oxfordharriman.com

In 2004, Rob earned the CERTIFIED FINANCIAL PLANNER® certification. The CFP® certification is a standard of excellence in financial planning. CFP® professionals meet rigorous education, training, and ethical standards, and are committed to serving their clients' best interests.

As a Financial Advisor and CFP® professional, Rob works with individuals to help them meet their short- and long-term financial goals. This advanced training focuses on investment planning and retirement planning, estate and tax planning strategies, and insurance planning. Rob takes a comprehensive approach and examines every element of a client's financial life, including debt management, cash reserves, estate strategies and tax strategies as well as family gifting.

Prior to joining Oxford Harriman & Company, Rob was a Managing Director in the Wealth Management Division of J.P. Morgan Private Bank, where he spent 17 years and managed assets for high-net-worth families, endowments, foundations and institutions. He was also responsible for the development of new advisors at the Private Bank including seeding them with new client relationships.

Rob is a graduate of Lehigh University. When not working with his clients, he is spending quality time with his two children on the beach, playing tennis, skiing, hiking as well as traveling. He currently lives in Short Hills, NJ.

ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

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