

Robert Frenkel, CFP®

Senior Managing Director & Partner, Chief Investment Officer



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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 firm.

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 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.

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. PM-06022026-7402245.1.1