MELTZER & HILL WEALTH ADVISORY OF OXFORD HARRIMAN & CO.

Philip Meltzer, CFP®

Managing Director & Partner

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Philip Meltzer is a Managing Director & Partner for Oxford Harriman, in the Kingston, New York office.

Prior to joining Oxford Harriman & Company, Philip was a co-founder and Partner of Meltzer & Hill Wealth Management, which became part of Oxford Harriman & Company in September 2023.

Philip started his financial career as a marketing representative for MFS Investment Management in Boston, MA in 2000. Philip has been a financial advisor since 2005 and focuses on portfolio and risk management including asset allocation and portfolio design.

Philip graduated from Boston College with a B.A. in Economics in 1998 and received an M.B.A from Georgetown's McDonough School of Business in 2003.

In 2007, Philip earned the CERTIFIED FINANCIAL PLANNER™ designation.

The CFP® certification is the standard of excellence in financial planning. CFP® professionals meet rigorous education, training, and ethical standards, and are committed to serving their clients' best interests.

Prior to his career in the financial services industry, Philip worked as a Senior Business Consultant for Unisys Corporation in Washington, D.C. from 2003 until his move back to New York. During his career at Unisys, Philip's clients included the U.S. Navy and the Transportation and Security Administration (TSA).

Philip served as former President of the Rhinebeck Chamber of Commerce and Rotary Club of Rhinebeck.

Philip lives in Rhinebeck with his wife Cari and their two children, Connor and Molly.

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