

Philip Meltzer, CFP® Managing Director & Partner



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Philip Meltzer serves as a Managing Director and Partner at Oxford Harriman & Co., where he leads the Kingston, NY office. With over two decades of financial services experience, Philip specializes in portfolio and risk management, focusing on asset allocation and tailored portfolio design to meet the unique goals of his clients.

Philip began his financial career as a marketing representative for MFS Investment Management in Boston, MA. He transitioned into financial advising and after 10 years, co-founding Meltzer & Hill Wealth Management, which later became part of Oxford Harriman & Co. in September, 2023. Throughout his career, Philip has demonstrated a steadfast commitment to helping clients navigate complex financial landscapes with clarity and confidence.

A proud graduate of Boston College, Philip earned his B.A. in Economics, followed by an MBA from Georgetown University's McDonough School of Business. In 2007, he

achieved the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) certification, underscoring his dedication to maintaining the highest professional and ethical standards.

Before joining the financial services industry, Philip worked as a Senior Business Consultant for Unisys Corporation in Washington, D.C., where he provided strategic guidance to clients such as the U.S. Navy and the Transportation Security Administration (TSA). His diverse experience brings a well-rounded perspective to his work as a financial advisor.

Active in his community, Philip has served as President of both the Rhinebeck Chamber of Commerce and the Rhinebeck Rotary Club. He and his wife, Cari, reside in Rhinebeck, NY, with their two children, Connor and Molly. Outside of work, Philip enjoys spending quality time with his family and contributing to the vibrant Rhinebeck community.

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