Mark S. Bailey

Managing Partner & Senior PIM Portfolio Manager

Oxford Harriman Offices

Astoria, New York
Boston, Massachusetts
Chagrin Falls, Ohio
Cleveland, Ohio
Detroit, Michigan
Dewitt, New York
Kingston, New York
Mentor, Ohio
Newport News, Virginia
Park Avenue, New York
Sarasota, Florida
Saratoga County, New York
Short Hills, New Jersey
Westlake, Ohio
Williamsville, New York
Woodcliff Lake, New Jersey

baileyfinancialgroup.net

As the founder and managing partner of the Bailey Financial Group, Mark has built a team culture based on a high level of dedicated client service. Their total team approach helps address a full range of client needs, with a particular emphasis on providing holistic retirement planning advice to help guide their clients to and through retirement.

Mark and his team build deep, personal connections with the individuals and families they serve. They have worked with many of their clients for years, often decades before they retire, allowing for the time and guidance to be well-prepared.

Mark counts hundreds of utility workers among the team's clients due to longstanding corporate relationships and familiarity with industry-specific benefits and challenges. He also provided financial and retirement planning services to members of credit unions for decades.

As the team's senior financial advisor, Mark is responsible for all the investment allocation and decisions of the team's advisory clients, managing more than $300 million in assets. He has a deep knowledge of all investment types, including fixed income opportunities such as bonds. He uses this information to construct custom discretionary accounts to help clients confidently pursue their specific goals.

Mark has more than 35 years of financial industry experience. Since 2015, Mark has served as Managing Partner and Senior Portfolio Manager of Bailey Financial Group and, after a brief affiliation with Raymond James, rejoined Wells Fargo Advisors Financial Network (FiNet) in a merger with Oxford Harriman & Company. Before founding Bailey Financial Group, Mark was a Senior Vice President at Morgan Stanley and an Assistant Vice President at Merrill Lynch. He also founded and co-owned an advisory firm, Membersfirst Advantage, which provided financial and retirement planning services to members of credit unions for more than 20 years.

He holds Series 7 and 63 securities registrations and an insurance license (CA #0F88271).

He is a graduate of Union College, where he earned a bachelor's degree in economics.

Mark and his team are involved with many charities in their communities. They are longtime corporate sponsors of Buffalo City Mission, Cradle Beach, Food Bank of Upstate New York, and Operational International ENT, to name just a few.

Mark is a native New Yorker, born in Utica. He has four children (Erin, Marisa, Olivia, and Henry), and two grandchildren (Maddox and Luke). He spends his free time with his family, splitting his time between Buffalo and Brooklyn as well as vacation spots like the Adirondacks and the Finger Lakes.

ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network (FiNet), the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. www.wfafinet.com.

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