

Philip Meltzer, CFP® Managing Director & Partner



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.

Oxford Harriman Offices

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

oxfordharriman.com

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.

Oxford Harriman & Company is a separate entity from Wells Fargo Advisors Financial Network.

www.wfafinet.com

Wells Fargo Advisors Financial Network is not a legal or tax advisor. Be sure to consult your own tax advisor and investment professional before taking any action that may involve tax consequences. Trust services available through banking and trust affiliates in addition to non-affiliated companies of Wells Fargo Advisors. Wells Fargo Advisors and its affiliates do not provide legal or tax advice. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC, a registered broker-dealer and a separate non-bank affiliate of Wells Fargo & Company. ©2023 Wells Fargo Advisors Financial Network, LLC. All rights reserved. Oxford Harriman & Company is a separate entity from WFAFN. PM-01272025-58414671.1.1