Dathan Lumpkins
Managing Director & Partner

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Dathan Lumpkins is a Managing Director and Partner in our St. Joseph, Michigan office. Dathan is an advisor who provides a forward-looking experience for families, and foundations/ charitable non-profits that align personalized and scalable solutions with a focus on strategy, advice, and service.

With roots in banking, insurance, and wealth management, Dathan's core belief for the past nineteen years is that great service is paramount.

Prior to joining Oxford Harriman, Dathan founded Lumpkins Private Wealth Management, which he launched to provide concierge experience to his clients. Dathan's core competencies include comprehensive planning, high net worth consulting, wealth transfer, executive services, and institutional services. Dathan understands that pursuing long-term financial goals is grounded in a disciplined approach to planning.

Earlier in his career, Dathan worked at Northwestern Mutual where he specialized in retirement planning for physicians.

He also spent more than a decade at JP Morgan Securities where he led a team that managed over $900 million in client assets as of May 2012. While at the JP Morgan Private Client Division, Dathan created and executed customized solutions for affluent families.

Dathan holds a Series 7 (General Securities Representative), Series 65 (Uniform Investment Advisor Law), Series 24 (General Securities Principal), Series 51 (Municipal Fund Securities Limited Principal), and Series 53 (Municipal Securities Principal) securities registrations. He is also licensed in Life & Health Insurance and Annuities.

Dathan holds dual degrees and graduate certificates from Harvard University: master's degree (ALM), Business Management; bachelor's degree (ALB), Global Studies, cum laude; Graduate Certificates: Finance, Strategic Management.