

Kelley Thompson

Managing Director & Partner



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Kelley Thompson is a Managing Director and Partner at Oxford Harriman & Company, bringing over nineteen years of experience in the financial services industry.

Kelley began her financial advisory career in 2006, partnering with her father, Steve Koren—a U.S. Army Officer and financial advisor who began his career in 1977. Prior to entering industry, Kelley graduated from Kent State University with a degree in Business Administration and a concentration in Marketing. She spent the early part of her career in outside sales and later worked in marketing and business development for Ernst & Young, where she gained valuable experience working with Fortune 500 C-suite executives.

In 2021, upon her father's retirement, Kelley acquired and continued to grow the family practice, further strengthening long-standing relationships while building new ones. She is passionate about helping clients simplify complex financial concepts and takes pride in crafting personalized strategies aligned with each client's unique goals and lifestyle. Known for her ability to listen deeply and communicate clearly, Kelley emphasizes trust, transparency, and long-term relationships.

Kelley's advisory practice focuses on

comprehensive wealth planning, including legacy and estate planning strategies, goal setting, risk management, retirement strategies, debt management, and investment planning for major life transitions and unexpected events. She is committed to delivering boutique-level service through Oxford Harriman & Company and Wells Fargo Advisors Financial Network (FiNet), offering access to a broad array of proprietary and non-proprietary investment solutions and institutional resources.

For Kelley, the most rewarding aspect of her work is building meaningful, long-lasting relationships with her clients. She approaches each relationship with care and integrity, treating clients as she would her own family.

Originally from Lyndhurst, Ohio, Kelley now resides in Mayfield Heights. She is the proud mother of her son, Tiger, a 2025 graduate of the University of South Carolina and former member of the Carolina Marching Band. Tiger is currently completing an internship with the Columbia Fireflies, a minor league baseball affiliate of the Kansas City Royals. Kelley has shared a sixteen-year relationship with her partner, Michael. In her personal time, she enjoys golfing, traveling, exploring new culinary experiences, and spending quality time with family and friends.

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For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.