

Wealth Management & Planning

Services for Coaches & Professionals in Sports

Oxford Harriman & Company

Cleveland Office

3201 Enterprise Parkway, Suite 400
Beachwood, Ohio 44122
Tel: 216-755-7150

Detroit Office

1301 W. Long Lake Road, Suite 105
Troy, MI 48098
Tel: 248-731-7596

Midtown Office

230 Park Avenue, 3rd Floor West
New York, New York 10169
Tel: 212-390-9525

New Jersey Office

50 Tice Boulevard, Suite 340
Woodcliff Lake, NJ 07677
Tel: 201-918-4008

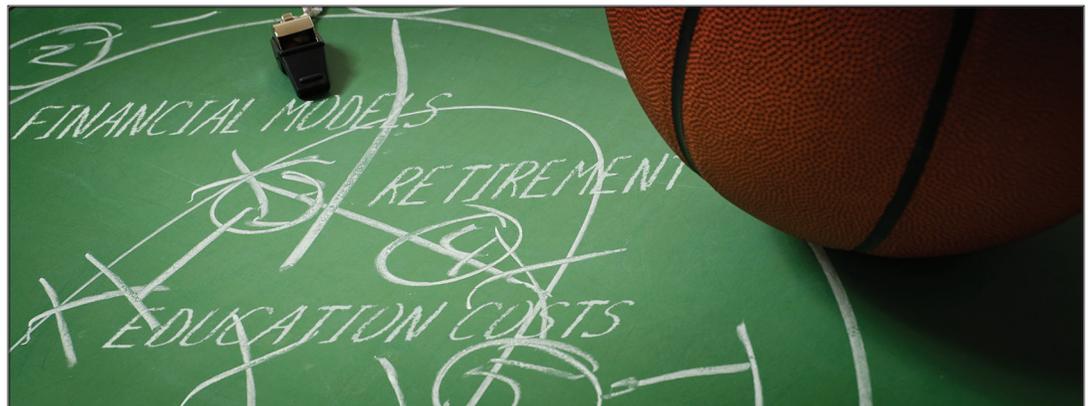
Manhattan Office

405 Lexington Avenue, 26th Floor
New York, New York 10174
Tel: 646-825-3109
by appointment only

Florida Office

333 S. Pineapple Avenue
Sarasota, FL 34236
Tel: 941-735-2914
by appointment only

www.oxfordharriman.com



As a coach or sports professional, you have complex and dynamic needs when it comes to wealth management and investment planning.

Often where you live can be temporary, your benefits vary among institutions, your salary never follows a continuous path, and employment opportunities are scarce.

At Oxford Harriman & Company, we understand the dynamic nature of your career, and we are here to support coaches, players and sports executives in all aspects of wealth management and investment planning.

Basketball is a passion of ours, and we've incorporated our life-long love for the sport into our company's very fabric by implementing financial programs and offerings that fully help to address the needs of clients in the sports profession.

Financial Services for Sports Professionals

Oxford Harriman & Company is an employee-owned boutique private wealth management practice committed to providing unbiased, full-service consulting and comprehensive, customized wealth management strategies.

Our goal is to provide the highest quality

investment planning and wealth management services to professionals like you – busy and extremely focused coaches, executives and players immersed in the challenges and intensity of your own sports career.

We're positioned to help you identify and plan for important life-events that are often overlooked in your busy day-to-day demands:

- Review & evaluate benefit plans offered to coaches, players and executives
- Determine how much you should defer in retirement plans, as well as how to allocate these assets
- Handle choices relating to retirement plans and deferred compensation when changing jobs
- Determine how much money will be needed to educate your children and when and how you should start saving for these goals
- How much you need for retirement, as well as developing a model of different retirement scenarios based on dynamic sport career assumptions
- When do you need life insurance and how much will you need to adequately protect your family



- Determine if you have the right team of professionals to help you achieve your career & life goals (agent, financial advisor, public relations, insurance, CPA, attorney, concierge)

The Unique Financial Needs of Coaches

If you work as a coach, your career path differs from most occupations. Long hours, extensive travel, and more frequent job changes are part of the profession.

Also, your earnings path differs vastly from other professions. A career in coaching may mean working for nearly free at times while your peers are making close to six figures. A coach can find him or herself in a transition period, between positions, where living off savings becomes a necessity.

And in the world of coaching, prime earning years can occur at any time in your career. It is not uncommon for a coach to earn a large percentage of their lifetime earnings within a single contract.

You need to embrace this financial reality, as it's essential to creating your overall plan.

Retirement for Sports Professionals

Many of our corporate clients have the opportunity to retire on their own terms. But this is often not the case for professionals in your arena.

Many times the world of sports will retire you, and it can occur when you least expect it.

So how many chances do you have to get this right? The answer is usually one. Everything you will work for your entire life depends on getting this right the first and only time.

Our Promises to You

At Oxford Harriman and Company, we make these promises to our sports industry clients:

- We will help you to maximize your career potential while creating valuable time for you to spend with your family.
- We will become an important teammate to your family as your career progresses and your family grows.
- Every member of our team is deeply committed to delivering a high-level of responsiveness, transparency and collaboration in a manner that is cost-effective and predictable.

Our Founder and President Dennis Barba is often asked what it is that Oxford Harriman and Company does. He often answers, "We worry a lot." When asked what he's worried about, Dennis responds, "We worry about what you should be worried about."

Let us help you do your job better by striving to remove the worry about your personal wealth management. We are here to help you take control of your financial future.

We hope to have an opportunity to meet with you and discuss how we can become teammates with you and your family.

Dennis P. Barba, Jr., Ph.D.
President & Managing Partner
Oxford Harriman & Company

www.oxfordharriman.com

Investments and Insurance Products: NOT FDIC Insured. NO Bank Guarantee. MAY Lose Value.