OXFORD | HARRIMAN & COMPANY

Things We Believe

Oxford Harriman & Company

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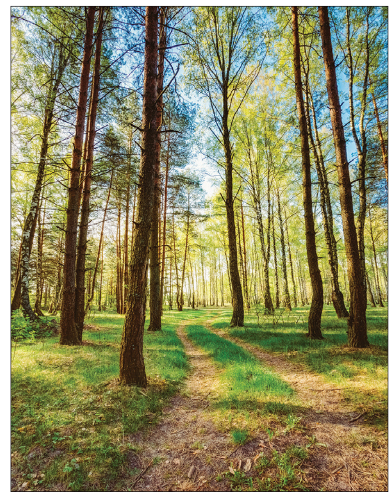
At Oxford Harriman & Company, we work closely with you to develop strategies around wealth accumulation, risk management, liquidity & income planning, and wealth transfer. Our efforts are guided by the following beliefs:



We can help you establish a disciplined plan to avoid the common financial roadblocks and pursue your financial goals.

We believe in relationships.
We engage clients on the basis of relationship, attitude and synergy, as opposed to net worth. We focus on the unique financial needs of our client's families by adding value and helping to reduce stress through excellence in investment management and comprehensive planning.

We believe in independence.
We are beholden to no one but our clients, with no obligation to utilize any investment product from any specific institution. Our process involves finding, analyzing and recommending the best available products and strategies from the investment universe no matter their origin or ownership.

We believe in listening.
By having in depth conversations with our clients, we can identify their unique financial needs, understand their family's values, and gauge their tolerance for risk.

We believe in educating.
Our clients understand their wealth management and planning strategies resulting from collaborative conversations about the customized investment strategies we present.

We believe in communicating.
We are proactive in thought leadership so our clients know exactly what we are thinking, planning, and doing, and why. Additionally, it is critical to us that we understand your needs and concerns. Therefore, we always engage in open dialogue.

We believe in coordination.
We will work closely with your tax, legal, and insurance advisors, as well as other family/business consultants to craft efficient and effective plans. We will also help source any additional resources needed such as lending, charitable giving, and fiduciary & estate services.