Patrick J. Walsh, CFP ®
Partner, Senior Advisor, Oxford Financial Partners

As a Senior Advisor in the firm, Pat's primary role involves preparing for and delivering advice in client meetings. This includes assisting with investment research, producing financial planning analyses and conducting insurance policy reviews, as well as populating Oxford's proprietary Financial Wellcheck℠. Pat also prepares investment proposals for clients, making sure the plans adhere to Oxford's Power of 5 Investing® philosophy.

As Chief Compliance Officer, Pat leads Oxford's operations and compliance areas, with oversight on technology, custodial relationships, and client service. Pat also serves on Oxford's Investment Committee, leading the administration of the Committee, as well as providing valuable research and input into Oxford's asset allocation and investment selection efforts.

Pat completed his undergraduate studies at Miami University with a major in finance and a minor in marketing, while also studying abroad. He joined Oxford in August 2010 after a successful three-year stint with MassMutual Financial Group, where he was the 2008 New Planner of the Year. Pat earned the CERTIFIED FINANCIAL PLANNER™ certification, and has also served on the local board for the Miami University Alumni Association. He currently serves on the board of directors for the Financial Planning Association of Southwest Ohio.

Pat and his wife Marty live in Newtown on the Cincinnati's east side along with their daughter Charlotte, son Patrick and rescue dog Bailey. They are members of Ivy Hills Country Club and enjoy participating in the club's many family activities. He is an avid Notre Dame football and UC basketball fan and enjoys spending time with friends, playing intramural sports, and golfing.