

## Resume' of

**Johanna Fox Turner, CPA, CFP<sup>®</sup>, RLP<sup>®</sup>**

**Member/Owner**

**Milestones Financial Planning, LLC**

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www.milestonesfp.com

*Johanna Fox Turner passed both the CERTIFIED PUBLIC ACCOUNTANT exam (1979) and the CERTIFIED FINANCIAL PLANNER<sup>®</sup> exam (2006) in her first sittings. She is among only 23% of CFPs who are women.*

*Johanna has worked as a CPA for over 30 years and decided to expand into investment management and financial services to give clients an option for competent, ethical financial planning services. She opened the doors to Milestones Financial Planning, LLC on August 1, 2008 and is the only Registered Life Planner (RLP<sup>®</sup>) in Kentucky and Tennessee. Johanna has two married sons and two beloved grandchildren. She lives in Mayfield, KY with her husband, Bob, who owns several businesses.*



### Education and Licenses

**Lipscomb University, Nashville TN, Co-Valedictorian, BS, Accounting, 1979**  
**Certified Public Accountant, Tennessee, 1980; Kentucky, 1988**  
**CERTIFIED FINANCIAL PLANNER<sup>™</sup> Certificate, 2007**  
**Series 65 license, 2007**  
**Registered Life Planner<sup>™</sup> Certificate, 2009**

### Work History

**Johanna Fox CPA, Inc., Mayfield KY**  
**Owner/President, 1994-Present**

**Self-employed, Kentucky**  
**Accountant, 1982-1993**

**Fox & Westpheling CPA, Fulton KY**  
**Partner, 1989-1991**

**Tongate, Ryan, Connelly & Shaub, CPA, Nashville TN**  
**Staff Accountant, 1978-80**

### Experience

- Business planning, consultation, startups, and family negotiation
- Income tax planning and preparation, including multi-state taxation
- Financial planning with an emphasis on Life, Retirement, and Estate Planning
- Estate and Trust consultation, including recommendations and planning
- Business retirement plans
- IRA rollovers and Roth conversions

### Community

**His House Ministries Church, Mayfield, KY, active member**  
**Mayfield-Graves County Chamber of Commerce, Mayfield KY, past President**  
**Mayfield-Graves County CEO Roundtable, initial organizer**  
**Four Rivers Business Journal, Monthly Financial Planning Columnist**  
**W KY Regional Chamber Alliance, Charter Member, Treasurer and Finance Committee Chair**  
**Campaign Treasurer, Teresa Cantrell for Mayor of Mayfield**  
**Graves County Republican Party, past Chairman**  
**2004 Republican National Convention, Alternate Delegate**  
**Mayfield City Council, past Councilwoman (two terms)**  
**BNI (Business Networking International), Paducah KY, past Vice President**  
**Mid-Continent University, Mayfield KY, past Finance Committee Chair, Board of Trustees**  
**Bellemeade Neighborhood Association, Initial Organizer**

### Other Interests

- Physical fitness
- Cooking
- Crossword puzzles
- Reading