

Resume' of Johanna Fox Turner, CPA, CFP[®], RLP[®] Principal

Milestones Financial Planning, LLC

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

After helping CPA clients for many years with their finances and searching for quality referral sources, she realized the need for competent, ethical financial planning services that addressed more than just clients' investments. She opened the doors to Milestones Financial Planning, LLC on August 1, 2008 and is the only Registered Life Planner (RLP[®]) in Kentucky and Tennessee. Johanna has two grown 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[™] Certificate, 2007
Series 65 license, 2007
Registered Life Planner[™] 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, including family negotiation
- Income tax planning and preparation, including multi-state taxation
- Financial Planning
- Estate and Trust consultation, including recommendations and planning
- Retirement planning
- Business retirement plans
- IRA rollovers and Roth conversions

Community

His House Ministries Church, Mayfield, KY, member
Mayfield-Graves County Chamber of Commerce, Mayfield KY, past President
Mayfield-Graves County Chamber of Commerce, CEO Roundtable, initial organizer
Four Rivers Business Journal, Monthly Financial Planning Columnist
W KY Regional Chamber Alliance, Charter Member, Treasurer and Finance Committee Chair
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

- Bicycling and physical fitness
- Cooking
- Crossword puzzles
- Reading