

Resume' of Johanna Fox Turner, CPA, CFP®, RLP® Member/Owner

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.

Johanna has worked as a CPA for over 30 years. She chose to expand into investment management and financial services to give clients an option for competent, ethical financial planning and investment management. She opened the doors to Milestones Financial Planning, LLC on August 1, 2008 and is one of only three Registered Life Planners (RLP®) in Kentucky and Tennessee. Johanna has two married sons and two beloved grandchildren and lives in Mayfield, KY with her husband, Bob, a successful entrepreneur.



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 <i>Owner/President, 1994-Present</i>	Self-employed, Kentucky <i>Accountant, 1982-1993</i>
Fox & Westpheling CPA, Fulton KY <i>Partner, 1989-1991</i>	Tongate, Ryan, Connelly & Shaub, CPA, Nashville TN <i>Staff Accountant, 1978-80</i>

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
Continuing Education Instructor (Finances) for licensed electrical contractors
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, past Treasurer and Finance Committee Chair
Treasurer, Teresa Cantrell for Mayor of Mayfield (successful campaign 2011)
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

Memberships

- National Association of Personal Financial Planners (NAPFA™)
- Financial Planning Association
- Kentucky Society of CPAs