Our Services

We offer customized solutions on a Fee-Only™ basis to clients throughout the United States .

For Individuals:

- Investment Advice & Account Management
- Financial Life Planning
- Retirement Planning & 401(k) Rollovers
- Estate Planning
- Income Tax Planning
- Education Funding

For Businesses:

- Succession Planning
- Employee Retirement Plans
- Business Consulting

As a Fee-Only™ firm, all of our charges are transparent. You will never pay a commission and you will always know what it costs to do business with us. Found out more at napfa.org.

NAPFA
The National Association of Personal Financial Advisors

Milestones Financial Planning, LLC

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Toll free: 800-991-2721
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The KINDER INSTITUTE of LIFE PLANNING

Leaders in training financial professionals in client communication

Milestones Financial Planning, LLC, is an Investment Advisory firm registered under the laws of the state of Kentucky.

Fee FO Only

MILESTONES

Financial Planning, LLC

"It's when ordinary people rise above the expectations and seize the opportunity that MILESTONES *truly are reached."*

Mike Huckabee

DREAM IT...

PLAN IT...

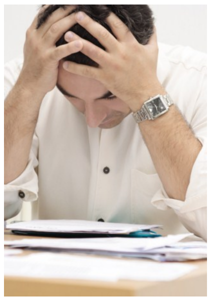
LIVE IT!

Tel: 270.247.0555

Consider us your "financial physician"

Personal Finances can Complicate Your Life

When people first come to our office,



one emotion they have in common is embarrassment over their money habits. What they don't realize is that *nobody* has it all figured out.

People often think that handling finances is as easy as saving more than they spend, but it is far more profound. Our relationships with money are a product of:

- Childhood experiences
- Marital relationships
- Future goals—or lack thereof
- Lack of time
- Unresolved conflicts—and more

We help clients recognize harmful money attitudes so that they can build fresh, healthy financial habits. As a "financial physician", we help clients find solutions to become fiscally healthy, followed by periodic checkups. The results of changing your monetary diet can be amazing!

Why Milestones?

At Milestones, we know our clients are ***people***, not ***numbers.*** We don't use a "one-size-fits-all" approach.

We bring 30 years of experience into every client relationship. Our expertise allows us to look at the many parts of your financial stresses—from saving for retirement to taxation to estate planning and more. We see through the clutter to find what is essential for you to reach your goals.

Johanna F. Turner
CPA, CFP®, RLP®

"Some people are great teachers, some have a green thumb, and others are mechanically inclined.
I help my clients live their best lives possible. This is my calling."

How do *you* define success? Whether it's a top-notch retirement plan, a cottage on the beach, or erasing all of your money worries, we help bring your dreams to reality. This gives you focus and clarity of purpose.

Fee-Only™

Milestones is proud to be one of a limited number of Fee-Only® advisory firms. *We do not sell any products.*

Because we are not concentrating on earning commissions, we can focus on recommending *only* the products and services that will help you achieve your goals in the most cost-effective way possible. Find out more about Fee-Only advisors at napfa.org/consumer/index.asp.

Contact us today for your free initial consultation. We'll enjoy a hot cappuccino and a good conversation while we answer your questions. The cost? Only your time.

Don't miss another day of living your best life possible!

MILESTONES
Financial Planning, LLC

Interested in a one-stop financial experience? Our sister firm, Fox & Company CPAs, a full-service accounting, tax, and QuickBooks consultation firm, is located just next door. Call 270.247.6087 for more information and to schedule your free consultation.

FOX & COMPANY CPAs