

**Resume' of**  
**Michelle Neiswender, MBA**  
**Investment Advisor Representative**  
**Milestones Financial Planning, LLC**  
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*Michelle Neiswender comes to the world of fee-only financial planning with a background in accounting, logistics, and office management. She is passionate about helping clients create a sustainable financial future and has begun a three year apprenticeship to become a CERTIFIED FINANCIAL PLANNER.*

*Michelle, a California native, relocated to Kentucky in 2006 with her family after her husband, Thom, retired from the United States Navy. She lives in Graves County with Thom and their young daughter, Sara.*

**Education and Licenses**

**California State University Northridge**, Northridge, CA, BS, Business Administration with an emphasis on Business Law, 1999  
**Certified Bookkeeper**, The American Institute of Professional Bookkeepers, 2009  
**Murray State University**, Murray, KY, MBA, 2010  
**Series 65 License**, 2011

**Work History**

<b>Johanna Fox CPA, Inc.</b> , Mayfield KY <i>Certified Bookkeeper</i> , 2006–present	<b>Raytheon Technical Services Company</b> , Oxnard CA <i>Logistician</i> , 2004-2006
<b>Anteon Corporation</b> , Oxnard CA <i>Logistician</i> , 2000-2004	<b>Naval Construction Center</b> , Port Hueneme CA <i>Testing Officer</i> , 1994-1999

**Experience**

- Client services specialist and TradePMR liaison
- Income tax preparation, including multi-state taxation
- Budgeting and debt management
- Office manager of CPA and financial planning firms

**Community**

**Seven Oaks church of Christ**, Mayfield, KY, active member  
Preschool and kindergarten Sunday School teacher  
Bread Ministry coordinator  
El Salvador mission trips

**Graves County Soccer Association**, Mayfield, KY, Board Member and active volunteer

**Mayfield-Graves County Toastmasters**, Mayfield, KY, Secretary-Treasurer and active member

**Relay for Life**, Oxnard, CA, 2001-2005  
Team Development Chair (2 years)  
Team Captain (3 years)

**Volunteer Income Tax Assistance**, Tax Preparer, Naval Base Ventura County, Port Hueneme, CA, 1995-1999

**Other Interests**

- Spending time with family
- Soccer and basketball
- Cooking
- Reading