LEADERSHIP PROFILE

CAROLYN M. BOWER, CFP®

WEALTH PLANNER

"A comprehensive financial plan is something I enjoy preparing as a means of assisting our clients in making informed decisions that impact their financial goals."

Carolyn Bower is a Wealth Planner with Oxford Financial Group, Ltd. Carolyn prepares holistic financial plans that focus on the unique challenges our high and ultra-high net worth clients face. She joined the firm in 2016 as a Client Relationship Manager.

Prior to joining Oxford, Carolyn served as an Associate Advisor at Whitnell. In this role, she prepared comprehensive financial plans, including net worth, cash flow, stock options, insurance, education and retirement planning.

Carolyn graduated from the University of Illinois at Urbana-Champaign with a Bachelor of Science degree in Consumer Economics & Finance with a concentration in Financial Planning. She received a Financial Planning certificate from DePaul University and, in 2013, earned her CERTIFIED FINANCIAL PLANNER™ designation.

Carolyn lives in Chicago and enjoys watching sports, cooking and traveling.

Certified Financial Planner™ (CFP®) professionals are licensed by the CFP® Board to use the CFP® mark. CFP® certification requirements include: bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP® Board (www.cfp.net), successful completion of the CFP® Certification Exam, comprised of two three-hour sessions, experience requirement: 6,000 hours of professional experience related to the financial planning process or 4,000 hours of apprenticeship experience that meets additional requirements, successfully pass the Candidate Fitness Standards and background check, agree annually to be bound by CFP® Board's Standards of Professional Conduct and complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and Standards of Professional Conduct. OFG-2011-07