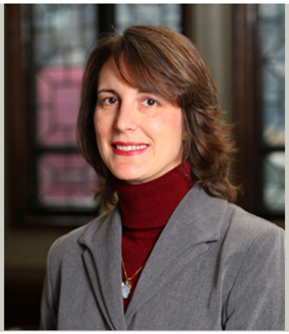
LEADERSHIP PROFILE

KARA J. TALBOTT, MSIA, CPA/PFS, CFP®

SENIOR WEALTH STRATEGIST



“Excellence is a continual journey. To be successful on this journey, we must truly care about the people involved—both our clients and our associates—and have passion for what we do each day.”

As Senior Wealth Strategist at Oxford Financial Group, Ltd., Kara acts as the technical director for Family Office Services and often meets with outside advisors who are a part of the overall planning team for clients. Her primary focus is on creating trusts and estate strategies tailored to the specific needs and desires of Oxford’s clients.

Kara has been with Oxford for over 15 years and serves as chair for Oxford’s Family Office Technical Strategy Committee.

Prior to joining Oxford, she spent eight years in the tax department of Ernst & Young, LLP. While there, Kara worked with clients on estate and financial planning issues, reviewed complex income and gift tax returns and developed presentation and internal materials related to a variety of estate and gifting strategies. This experience allowed her to develop the gift, estate and tax technical skills to provide high-level planning support to Oxford’s client service teams.

Kara graduated from Purdue University’s Krannert School of Management with a Bachelor’s degree in Accounting and Finance, as well as a Master of Science in Industrial Administration. She has earned both the CPA/PFS and Certified Financial Planner™ designations and is a member of the American Institute of Certified Public Accountants (AICPA) and the Indiana CPA Society (INCPAS).

Kara is a member of her local church where she serves as an Elder. She enjoys activities within the church and with her husband and two children. Kara also serves on the Planned Giving Committee for the YMCA of Greater Indianapolis.