LEADERSHIP PROFILE

KARA J. TALBOTT, MSIA, CPA/PFS, CFP®

SENIOR WEALTH STRATEGIST & FAMILY OFFICE FELLOW

"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 a Senior Wealth Strategist and Family Office Fellow at Oxford Financial Group, Ltd., Kara serves as a technical resource for Family Office Services, its clients and Oxford's Managing Directors. Kara has been with Oxford Financial Group, Ltd. for over 20 years. Her primary focus is working with legal and tax counsel to identify trust structures and estate strategies tailored to the specific needs and desires of Oxford's multi-generational family clients. She often meets and collaborates with outside advisors who are part of the overall planning team for clients.

Prior to joining Oxford, she spent over 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 presentations 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 CFP® designations and is a member of the American Institute of Certified Public Accountants (AICPA) and the Indiana CPA Society (INCPAS).

Kara lives in south central Indiana with her husband and two children where she enjoys her family, the local professional theater and the tranquility of her rural setting. She is involved in her community, supports various organizations including the county foundation and is an Elder in her church.

The Certified Public Accountant (CPA) is the statutory title of qualified public accountants in the US who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements. Certification is administered by each state. The Personal Financial Specialist™ (PFS™) designation is awarded by the American Institute of Certified Public Accountants (AICPA) to candidates who display their expertise in the field of financial planning. Candidates must be a member of the AICPA, hold an unrevoked CPA certificate issued by a state authority and have at least two years of teaching or business experience (3,000 hours equivalent) in personal financial planning within the five-year period preceding the date of the CPA/PFS application. Candidates must have 75 hours of personal financial planning education within the five-year period preceding the date of the PFS application and pass a final examination. The designation requires 60 hours of continuing education every three years. 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.

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