



LEADERSHIP PROFILE

As a Managing Director and Family Office Fellow at Oxford Financial Group, Ltd., Kara Talbott serves as a technical resource for clients and the partners who support them.

Kara is focused on serving multi-generational families who have complex trust structures to ensure they are well educated and equipped to enhance their financial legacies. Kara is highly collaborative with clients and their internal and external advisory teams, providing a cornerstone of the exceptional service clients experience at Oxford.

Prior to joining Oxford, Kara spent over eight years in the tax department of Ernst & Young, LLP. While there, she worked with clients on estate and financial planning issues, reviewed complex income and gift tax returns and developed presentations related to a variety of estate and gifting strategies. Kara's experience at Ernst & Young bolstered her knowledge of the gift,

KARA J. TALBOTT, MSIA, CPA/PFS, CFP® MANAGING DIRECTOR & 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."

estate and tax technical skills she uses to provide Oxford's clients with high-level planning support.

Kara graduated from Purdue University's Krannert School of Management with a bachelor's degree in accounting and finance. She went on to receive her master of science in industrial administration.

Kara and her husband live in south central Indiana and have two adult children. Kara enjoys time with her family and the tranquility of her home's rural setting. She is involved in her community, supports various organizations including the local community foundation and is an Elder in her church.

Kara's premier service and expertise allows clients to gain ever-increasing confidence and trust in their wealth enhancement strategies as they continue to rely on Oxford to help navigate the complexities of their financial lives.

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™ 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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