MICHELLE NEISWENDER

MBA, CFP®

PARTNER

CONTACT

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EDUCATION

BACHELORS OF SCIENCE
Business Administration with an Option in Business Law
California State University Northridge
1999

MASTERS
Business Administration (MBA)
Murray State University
2010

LICENSES

Series 65—2011
Kentucky, Tennessee, Texas

Certified Financial Planner™—2015

PROFESSONAL ASSOCIATIONS

National Association of Personal Financial Planners (NAPFA)

Financial Planning Association (FPA)

PROFILE

Michelle Neiswender passed the CERTIFIED FINANCIAL PLANNER™ exam (2015) in her first sitting. She is among only 23% of female CERTIFIED FINANCIAL PLANNERs™.

Originally from southern California, Michelle moved to Kentucky in 2006. Growing up, she saw first-hand how money illiteracy affected family harmony . When Michelle began working with Johanna, she knew her passion to help others solve money problems had found a home. Michelle worked at Fox & Co. CPAs until Johanna stole her away to Fox & Co. Wealth Management (formerly Milestones). Before long, she became partner and is now in charge of back office operations and assists clients with cash flow, investing, and planning.

Michelle lives in Mayfield, KY with her husband, Thom, a retired Navy Seabee, and their daughter, Sara.

EXPERIENCE

Prior to joining the Fox & Company team, Michelle worked for the Department of the Navy as a logistician. During those years, she found ways to use her money management talents to help others by providing budgeting advice to her husband's troops and volunteering as a VITA tax preparer for active and retired military members.

Michelle's vision for Fox & Co. Wealth Management was to build a commission-free planning and investment practice based upon a simple, transparent cost model. She has had no complaints filed against her or her business. She and her business partner, Johanna Fox Turner, CPA, CFP®, RLP® serve clients nationwide and in Mexico.

Specialties include:

- Investment analysis and management
- Cash flow and debt management
- Insurance needs and analysis
- Retirement planning
- Continuing Education Instructor — Finance

COMMUNITY

Seven Oaks Church of Christ: Sunday School teacher, Lads to Leaders Bible Bowl teacher, Bread Ministry coordinator

Merryman House Domestic Crisis Center: Secretary, Finance Committee, Fundraising Chair, past Treasurer

Cornerstone of Hope, Inc.: Treasurer

Paducah Area Chamber of Commerce: Membership & Marketing Committee member

River City-Paducah Business & Professional Women: Newsletter editor and member

Paducah Leadership Foundation: Leadership Class #28

Sedalia Elementary: past SBDM Minority Parent Representative