

The CoxHealth Foundation does not offer advice on financial or estate planning but does provide referrals for professionals in our community that are respected in their field. These individuals below have been vetted by this organization and are offered as recommendations for those seeking services for financial management, estate planning creation and or management.

**Estate and Financial Planning Professional Advisors Council**

**Paula Dougherty, MBA, CFP®, ChFC®, CRPC®, APMA®, CASL** 417-877-0252  
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**We design a personalized financial plan that focuses on your goals and specialize in the areas of investments, retirement planning and distribution strategies, insurance, tax and estate planning, and charitable giving.**

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**Central Trust Company is a fiduciary working in your best interest. We use a team approach to design a goals-based financial plan which serves as the foundation for your investment portfolio. We manage investments and help our clients plan for retirement as well as taking care of their family through their estate plan. We can also serve as Trustee or successor Trustee in your estate plan.**

**Shelly L. Titus, CFP®, AIF®** 417-522-0594  
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**BKD Wealth Advisors, LLC is an independent wealth management firm for affluent families and institutions. We build trusted relationships with our clients and tailor integrated solutions to meet their goals. Our advisors combine their knowledge and wisdom with the expertise of top professional institutions, including BKD, LLP, a national CPA and advisory firm.**

**Anne Sallee Mason, J.D.** 417-882-9090

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**Ms. Mason graduated magna cum laude from William Woods College, Fulton, Missouri, in 1984 with a Bachelor of Arts in Business Administration, and obtained her Juris Doctorate from the University of Missouri-Kansas City in 1987. She has practiced law with the firm of Neale & Newman, LLP for over 23 years and practices in the areas of estate planning, probate administration, and trust administration. She has presented numerous seminars on these topics.**

**Jeremy Loftin, CFP®, CTFA** 417- 823-9600

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**Legacy Bank and Trust exists to serve as the financial leader in economic and community development by providing financial products and services in the largely underserved populations of Southcentral Missouri, and its employees and shareholders are committed to partnering financially with customers to ensure vital capital investment in these communities.**

**Candice J. Reed** 417-888-2201

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**U. S. Bank Wealth Management and Trust Advisor Services develop and implement Financial Plans for clients and prospective clients, work with team to ensure that clients are getting serviced for existing needs while bringing up potential future needs for U.S. Bank services.**

For more information on how to make an estate gift or participate in financial planning programs offered by the CoxHealth Foundation, please contact Lisa Alexander at 417-269-7109 or [lisa.alexander@coxhealth.com](mailto:lisa.alexander@coxhealth.com)