

Tara L. Scottino, CFP[®], Senior Vice President, Carter Advisory Services, Inc.
Panel Discussion: What Are the Educational Priorities for Future Financial Planners?

Tara is senior vice president of Carter Advisory Services, Inc. (CAS), the registered investment advisory firm affiliated with Carter Financial Management. Tara is directly involved in pursuing the achievement of each client's financial plan objectives. As Senior Vice President, Tara also oversees daily office operations while providing technical support for the planners of Carter Financial Management.

Prior to joining CAS, Tara was Senior Vice President of Investments and Planning for a local wealth management firm whose core client base consisted of ultra-high net worth individuals. Tara was responsible for financial planning (including advanced estate and tax planning) and portfolio management for those ultra-high net worth individuals. Tara also managed team members, including workflow, team member recruitment, training and development.

Tara also serves on boards and committees of several local nonprofit organizations. In her spare time, Tara enjoys running, cycling and swimming, as well as any other outdoor activity. She has completed several marathons and triathlons, including the Redman 140.6-mile full distance triathlon in Oklahoma City in September.

Tara holds a B.S. in Psychology from Texas A&M University, and is a Certified Financial Planner[™] with more than 11 years' experience in financial planning and banking.