

# Mary Jane Koesters, AIF®

Financial Advisor / Director of Financial Services



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Mary Jane is a Financial Advisor/Tax Preparer with Moorman, Harting & Company. In order to provide the highest level of service to her clients, Mary Jane has attained her AIF® designation and attends continuing professional education courses and is currently studying to become a CERTIFIED FINANCIAL PLANNER™ professional. Mary Jane is also part of the Leadership Team. She started at Moorman, Harting & Company in 2004 and specializes in providing the following services:

- Assisting individual clients through the multiple facets of wealthcare management: the discovery phase where their unique goals, needs and resources are identified; the implementation phase where clients adopt and implement recommended action steps; and the review phase where a clients' individual situation is closely and continuously monitored, and modified when necessary, throughout the various stages of their life
- Servicing of pension plans for employers
- Assisting individuals with minimizing their tax liabilities

Mary Jane is a graduate of St. Henry High School, and has an Associate's Degree in Computer Information Systems from Sinclair Community College and a Bachelor of Science Degree in Accounting from Wright State University. Mary Jane resides in St. Henry, Ohio, with her husband, Kevin and their three children.

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*"The most rewarding aspect of my career is helping clients define & achieve their life goals."*

*Sincerely, Mary Jane*