



Josh Gallogly, CFP®, EA

### Media Bio

Josh Gallogly, CFP®, EA is the Managing Member and Founder of Milestones Financial, a fee-only financial planning firm based in Columbus, Ohio. Josh specializes in tax-efficient strategies, retirement income planning, and providing clear, objective financial guidance. He's been quoted in national media outlets including MarketWatch and CBS News for his straightforward, client-first perspective. As a CERTIFIED FINANCIAL PLANNER® professional and an enrolled agent of the IRS, Josh helps individuals and families make confident decisions without product sales or asset management requirements.

### About Milestones Financial

Milestones Financial is a fee-only, advice-only advisory firm that provides flat-fee and hourly financial planning services to individuals approaching or navigating retirement.

This model ensures that clients pay only for the time and advice they need—without requiring investment management or product purchases. Because compensation is not tied to commissions or asset-based fees, this approach significantly reduces common conflicts of interest and helps keep the focus on what's best for the client.

Every recommendation is made with the client's goals in mind, making it easier to uphold a fiduciary standard of care and build lasting trust through objective, transparent guidance.

### Topics Josh Can Speak To

- Retirement income planning strategies
- Flat-fee and advice-only financial planning models
- Tax planning for retirees
- Investment decision-making without asset management
- How to choose a financial advisor (and what red flags to avoid)
- The fiduciary standard and its limitations in today's industry

### Media Contact

**Josh Gallogly, CFP®, EA**

Managing Member and Founder,  
Milestones Financial

Based in Columbus, Ohio

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