



John E. Dougherty III, MBA, CFP®, CRPC®

Partner and Director of Wealth Management at Dougherty & Associates

With over fifteen years in practice, John specializes in assisting corporate executives, business owners, and medical practitioners in planning for and dealing with significant life events including promotions, business sale or expansion, retirement, divorce, and generational wealth transfers. John is passionate about educating the corporate community about strategic retirement distribution options that are unique to specific corporate employers in the Cincinnati business community and has been featured on local news outlets including NPR. Another area of John's focus is the transition of wealth or business interests, as well as the values of stewardship, from one generation to the next.

John is a member of the Southwest Ohio Financial Planning Association, the Cincinnati Estate Planning Council, and a member of the Resource Group (elite group of leading financial planners within Lincoln Financial Advisors). John is a current and multi-year recipient of both Cincinnati Magazine's Five Star Wealth Manager Award, the Women's Choice Award, as well as a biographee of Who's Who in America and Who's Who in Science and Technology.

John has served on the Board of the Financial Planning Association of Southwest Ohio as Director of Public Relations, President, and Chairman. John also serves as President of the board of trustees at iSPACE, the STEM learning place, a non-profit organization serving the Greater Cincinnati Region endeavoring to make learning exciting by providing engaging Science, Technology, Engineering, and Mathematics (STEM) programs to schools, families and the community. John is a professional mentor for graduate students at his alma mater, Xavier University. The Xavier University Mentor Programs links students with leading executives and career professionals - offering an innovative approach by providing students practical application of networking skills, personal and professional growth over an extended period of time. John also is a volunteer coach for Loveland Youth Lacrosse and Baseball, a member of the Oasis Golf Club and St. Columban Church.

In his free time, John enjoys golfing, fishing, kayaking, skiing, and mostly, spending time with his two young sons and wife Ashley.