



Megan R. Dalton, CFS®, CFP®, Partner

Megan is an independent financial advisor and partner with Dalton Wealth Management in West Chester, Ohio. She has been with the firm since 2010. She works very closely alongside her father who started the firm in 1983.

As a CERTIFIED FINANCIAL PLANNING Professional, or CFP®, Megan works with individuals and families to help them work toward achieving many diverse short and long-term financial goals. She can help simplify complex subjects such as investment, estate, tax, and insurance planning. Megan also works hard to stay current on the difficult issues facing her clients in the areas of retirement planning, social security and health related issues (Medicare/Medicaid).

Another professional designation Megan holds is as a Certified Fund Specialist or CFS®. This is the oldest designation in the mutual fund industry. It certifies an individual's expertise in selecting professionally managed investments and knowledge of the mutual fund industry.

Megan is the 2016 Past-President for the Board of Directors of the Financial Planning Association of Southwestern Ohio. This year she will volunteer as Chairman for the FPA Board of Directors. She works hard to promote the local financial planning industry through peer networking and consumer awareness activities. She stays informed about legislative and regulatory issues while also arranging continuing education programs for other advisors in her area.

Megan graduated cum laude from Northern Arizona University in Flagstaff. She was President of the Mortar Board National Honor Society and a member of the Golden Key International Honour Society. After her post graduate studies in San Diego, Megan moved back to Ohio to be closer to her family.

In her spare time, Megan enjoys competitive ballroom dancing, sailing, golf, skiing, going to comedy shows, drawing, decorating and playing live trivia. She also likes to visit the local nursing homes on the weekends with her two therapy dogs, Molly (shitzu-poodle) and Lucy (mini-goldendoodle.)