



# MONICA DWYER, CFP<sup>®</sup>, CDFA<sup>®</sup>

Monica Dwyer, CFP<sup>®</sup>, CDFA<sup>®</sup>  
8897 Cincinnati Dayton Rd A  
West Chester, OH 45069

 (513) 779-3030

## Monica Dwyer, CFP<sup>®</sup>, CDFA<sup>®</sup> Wealth Advisor

START THE  
CONVERSATION



Our Solutions



Our Approach



Hours



Contact

## Certified Financial Planner In West Chester, OH

**Monica Dwyer, CFP<sup>®</sup>, CDFA<sup>®</sup>** joined Harvest Financial Advisors as a Vice President in 2018. She came with fifteen years of industry experience from a large institutional firm. She is dedicated to helping her clients achieve their goals and plan for the future with effective wealth management solutions in West Chester, OH, and across the United States. Monica



allows us to provide personalized, value-driven advice regarding investments and other important financial decisions.

## Why Choose Monica Dwyer?

Our wealth management services include investment management, retirement planning, estate planning, and more. We can design a comprehensive financial plan that works for you. We're also an independent multi-family office, specializing in assisting first- and second-generation families with a focus on establishing goals necessary for effective multi-generational wealth growth, protection, and transfer.

With our services, you can feel confident that you'll have access to the resources you need to pursue your dreams. As a fee-only wealth management firm, we don't charge for add-on services; rather, we believe that when a client pays a fee, they should enjoy all our services at the highest level. This also allows our financial advisors to offer a measure of transparency that may be absent in other establishments, providing our clients with the confidence to take charge of their future.

## Family Financial Consultant

Monica is also a Certified Divorce Financial Analyst® and can serve as either a neutral party to a couple going through a collaborative divorce or an advocate for one party to the divorce. She helps you and your attorney understand the financial impact and tax ramifications of decisions made during the divorce process. She helps you collect, organize, and prepare financial information (for both you and your attorney), and identify which financial information is most important. It's a standard practice to plan 20 years into the future to establish a path to a secure retirement. Monica also helps you expedite the divorce process, using the family law software which is also used by attorneys and the court system.

## Contact Us Today

Call our office at [\(513\) 779-3030](tel:5137793030) to schedule an appointment with Monica.



## Start the Conversation

\* Your Name

\* Your Email Address

\* Subject

Phone Number

\* Message

//



I'm not a robot

reCAPTCHA  
Privacy - Terms

Send

[Find us on Google Maps here:](#)



## More Details:

Come visit us online @ <http://www.harvestadvisors.com>

## We are open:

Monday 8:30 AM – 5:00 PM  
Tuesday 8:30 AM – 5:00 PM  
Wednesday 8:30 AM – 5:00 PM  
Thursday 8:30 AM – 5:00 PM  
Friday 8:30 AM – 5:00 PM

Monica Dwyer, CFP®, CDFA®  
8897 Cincinnati Dayton Rd A  
West Chester, OH 45069  
☎(513) 779-3030

