LEADERSHIP PROFILE

SCOTT M. SIMMONS, J.D., LL.M.

SENIOR WEALTH STRATEGIST

"Working with and assisting clients and their families to understand the strategies available to accomplish their personal goals is my professional goal."

As a Senior Wealth Strategist, Scott serves as a technical resource for Oxford Financial Group, Ltd.'s Family Office Services team, clients and Managing Directors. He brings two decades of experience working with clients and advisors to develop strategies for tax and estate planning. His primary focus is working with Oxford's clients to review and understand their current tax, trust and estate goals and working with clients and their advisors to create strategies to accomplish those goals and efficiently minimize the effects of taxes, administration delays and transfer costs associated with their wealth transfer plans.

Prior to joining Oxford, Scott served as a Wealth Strategist at Charles Schwab. While there, he worked with clients throughout the country providing education and understanding of various trust, tax and estate planning strategies, developed and gave presentations on estate planning and transfer strategies and served as an internal resource and partner for materials related to tax, estate and financial planning issues.

Scott received his Bachelor of Science degree in Business Administration from Arkansas Tech University. He received his Juris Doctor from the University Of Arkansas School of Law, and his Master of Laws in Taxation from the University of Denver. Scott is a licensed attorney in the state of Arkansas.

Scott lives with his wife and daughter in Fishers, Indiana. He enjoys taking advantage of the sporting, recreational and cultural activities that the Indianapolis area has to offer.