OXFORD FINANCIAL GROUP, LTD.™

LEADERSHIP PROFILE

SCOTT M. SIMMONS, JD, LL.M.

DIRECTOR, FIDUCIARY SERVICES
MANAGING DIRECTOR & FAMILY OFFICE FELLOW

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

Scott Simmons serves as Director, Fiduciary Services as well as Managing Director and Family Office Fellow for Oxford Financial Group, Ltd. and The Trust Company of Oxford™ (TCO). Scott leads our team of Fiduciary Officers in the implementation of fiduciary services for the clients of TCO, while enhancing Oxford's fiduciary services and wealth governance strategies. He is the lead subject matter expert on fiduciary matters and trust capabilities, including the use of directed trusts and dynasty trust structures.

Scott joined Oxford in 2016 as a member the Family Office Services Team where he enjoyed a variety of roles and highlighted his skills in both leadership and preparation of client deliverables. He will continue to serve as a technical resource for the team while working with the Chief Wealth Planning Officer to enhance the Family Office Services Team's overall presence and value to Oxford as a whole.

Scott brings more than 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 to then 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.

The Juris Doctor (JD) is a graduate degree in law. The LL.M. degree is a specialized law degree that practicing lawyers who have already passed the bar exam pursue as a way to advance their knowledge of law. OFG-2011-37