



LEADERSHIP PROFILE

Scott Simmons serves as a Managing Director and Senior Wealth Strategist with Oxford Financial Group, Ltd. Scott works to enhance the Family Office Services Team's overall presence and value by developing enhancements to Oxford's wealth governance strategies.

As a significant contributor to Oxford's Family Office Services practice, Scott serves as a lead technical resource and subject matter expert for the team. He 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 aimed at accomplishing those goals and helping to efficiently minimize the effects of taxes, administration delays and transfer costs associated with their wealth transfer plans.

SCOTT M. SIMMONS, JD, LL.M.

MANAGING DIRECTOR & SENIOR WEALTH STRATEGIST



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

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 Master of Laws (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-2607-2
