Philip S. Scott, Registered Representative, Private Client Services, Investment Advisor Representative

As a Financial Advisor, Phil has accumulated nearly 30 years of experience in the Financial Services Industry. His practice focus areas have always centered around his expertise in Retirement Planning. Phil's combined experience within the Defined Contribution space of 403(b), 401(k), 457(b) and MEP have allowed him the opportunity to assist his clients in the areas of Investment Planning, Rollovers, College Funding and Executive Benefits.

Phil has spent nearly his entire career working closely with employer-sponsored plans. Working on-site or virtually, his passion has always been Participant Education Services, working very closely with his individual clients as they plan for their retirement. This model has always been widely embraced and appreciated by his Employer-Clients, who sponsor Retirement Plans and value education for their Employees.

As the Founder, Owner and Operator of Strategic Capital Advisers- Phil's background includes the roles of Senior Financial Counselor and Regional Manager for one of the largest global recordkeepers, where he provided oversight for the Firm's Midwest' Healthcare Clients. Currently, as Operator of Strategic Capital Advisers, Phil's daily activities include running his Firm's Operations, Business Development, strategic planning and supporting a Team of Independent Advisors, who specialize in Retirement Plan' Participant Education Services.

Phil's MEP expertise includes working very closely with Closed-MEP and Open-MEP Sponsors from construction of the MEP, coordinating all efforts between the Sponsors' Administrators and the Fiduciary Experts to the Recordkeepers being interviewed. From construction phase to on-boarding the first Adopter, Phil has continual communications with each of the Service Parties, who are paramount in the operations of the MEP. In addition, Phil's primary role in developing the MEP is engaging with Adopters, who are considering the MEP. From on-boarding the Adopter to coordination of their Employee/Participant Enrollments, Phil is very involved in each of these aspects, prior to assigning one of his Advisors to each Adopter.

Prior to his career in Financial Services, Phil graduated from Wittenberg University and spent time in the NY Mets and NY Yankees' minor league affiliates, while pursuing the opportunity to play in the big leagues.

Phil is married to his sweet wife Lisa, together they enjoy their Children: Michael, Bryan and Megan as well as their grandbabies: Thatcher, Aibeline & Shepherd.