



Scott Gunn,

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ABOUT SCOTT

Scott has more than 20 years of investment consulting and financial planning experience which includes working for The Ayco Company, L.P. (a boutique financial planning firm) and Merrill Lynch (a global wealth management firm). Scott joined LGT in January 2009.

Scott's day-to-day responsibilities include investment advisory services, comprehensive financial planning and qualified plan consulting to employers. To this end, Scott works with business owners, senior-level Fortune 500 executives, professional athletes and other high net worth individuals providing investment and financial advice. Scott also serves as LGT Financial Advisory Group's Chief Compliance Officer and conducts due diligence on the firm's investment strategies.

Scott graduated from Duke University School of Law in 1994 and from Bucknell University in 1991. He is a licensed Certified Financial Planner (CFP®) and a Certified Plan Fiduciary Advisor (CPFA). In addition, he holds a Series 7 License (General Securities), a Series 24 License (General Principal), a Series 53 License (Municipal Securities Principal), a Series 63 License (Uniform Securities Agent State) and a Series 65 License (Uniform Investment Adviser) from the Financial Industry Regulation Authority (FINRA).

PROFESSIONAL ASSOCIATIONS

Certified Financial Planner Board of Standards, Inc. – Member
Financial Planning Association (FPA), Dallas-Ft.Worth Chapter – Member
Dallas Estate Planning Council, Member
Strategic Capital Fund Management, 2019-2020 Advisory Council
Pedi Place, Former Board Member, 2015-2016

PUBLICATIONS

Save Now, Rest Later

AREAS OF FOCUS

Personal Financial Planning
Investment Management
Retirement Planning
Estate Planning
Life & Health Insurance

ACADEMIC BACKGROUND

Bucknell University
Bachelors of Arts, Economics
Duke University School of Law
Juris Doctorate (JD)



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