

## Scott Logan, CFP®

### Wealth Manager

#### Oklahoma City

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Scott Logan has been helping people make smart financial decisions for over 20 years, specializing in portfolio management and holistic financial planning. Prior to merging his practice with HoganTaylor Wealth, Scott owned and operated Asset Planning Solutions, a portfolio management and holistic financial planning practice that served small business owners, mid- to-upper level executives, and other individuals experiencing career or life transitions. Scott is a CERTIFIED FINANCIAL PLANNER™ and a Registered Financial Advisor with the National Association of Personal Financial Advisors.

#### Representative Experience

- Designed investment policy statements for individuals and small business retirement plans
- Created and managed tax efficient and diverse investment portfolios for clients
- Provided retirement and financial planning services to executives of Fortune 500 companies
- Designed tax efficient retirement income strategies for individuals entering retirement
- Provided financial education to qualified plan participants

### Certifications & Honors

- CERTIFIED FINANCIAL PLANNER™ (CFP®)

### Professional & Civic Affiliations

- National Association of Personal Financial Advisors, Registered Financial Advisor

### Education

- B.A., Economics, Vanderbilt University

## Speaking Engagements

- Retirement Planning Class, Francis Tuttle Technology Center, Instructor, 2002-Present

**Please Note: Limitations:** *Neither recognitions by unaffiliated publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if HoganTaylor Wealth is engaged, or continues to be engaged, to provide investment advisory services.*