# Scott Poelman

## Co-Founder and Chief Business Development Officer

Scott Poelman currently serves as the Chief Business Development Officer at Olympus Wealth Management. He manages and seeks to preserve wealth for high-net-worth and ultra-high-net-worth clients with a focus on client management and planning. More specifically, he helps with coordination of the investment dialogue and integration of the investments with the estate plan, and he helps plan for liquidity events, taxes, estate planning, wealth transfers, charitable giving, asset protection, business succession and retirement.

Mr. Poelman has over 10 years of experience working with wealthy families. Prior to co-founding Olympus Wealth Management, Mr. Poelman worked at J.P. Morgan's Private Bank for three years as a private banker. As a private banker, Mr. Poelman had the same focus he has now. Among other things, he helped numerous clients manage liquidity events, including two of the largest in Utah's history. Before J.P. Morgan, Mr. Poelman worked for nearly six years as a tax lawyer. He started in California with six months at Sullivan Hill and then two years at Procopio, one of the largest law firms in San Diego. At Procopio, he was part of an 18-member tax team, one of the premier tax teams in San Diego. He then spent three years at Jones Waldo in Salt Lake City, one of the largest firms in Utah. As a tax lawyer, Mr. Poelman focused on client management and tax planning for wealthy families and closely-held businesses. Among other things, he addressed many sophisticated estate planning issues for multi-million dollar estates.

Mr. Poelman serves on the executive committee of the Salt Lake Estate Planning Council. He enjoys family, friends, church, healthy eating, fitness, racquet sports, golf, reading and the outdoors. He lives in Sandy, Utah, with his wife and four children.

### Education & Registration

LLM in Tax, University of San Diego School of Law | JD, Wake Forest University School of Law | BA, Brigham Young University | FINRA Series 66 Registration