# Vaughan Scott

**University of Louisville, College of Business**
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## My Personal and Professional Passions & Goals:

- Remain a servant leader creating work environments that inspire and attract top talent
- Continue to play it forward for our students and anyone else I can be of service to
- Develop the **Next Chapter® Institute** and be asked to do a TED Talk

## Prior Experience in Academia

**University of Louisville –** College of Business 07/2017 – Present
*Professor in Practice & ConsultMBA Curator (Full-Time and Professional MBA Programs)*
***Capstone Experience Consulting in Organizations (MBA670 & 671)***
Student teams address "real world" challenges by assisting businesses and organizations, by collaborating with their key executives, to improve aspects of their business practices and/or operations. During the two-module project, students develop detailed written plans that recommend specific courses of action.

**Family Firm Institute** - Global Education Network 01/2017 – Present
Boston, MA
***Families of Wealth: A Multi-Disciplinary Approach (GEN 202)***
FFI GEN delivers world-class curriculum, unparalleled access to prestigious faculty and thought leaders, and connections to a global network of specialists in the field.

## Professional History

**Axiom Financial Strategies Group, LLC** 03/2009 – Present
New Albany, Indiana
*Co-Founder & CEO*
Area of Specialization: *Strategic, Transition and Succession Planning for Entrepreneurs and Family Enterprises*

- Led the launch of our Independent Registered Investment Advisory firm in the midst of the COVID pandemic
- Led a transition from Smith Barney in 2009 during one of the worst financial disasters in our nation's history
- Re-branded our team under the Axiom name, restructured team to better serve clients and leverage expertise
- Worked with our team to identify our *Core Values:* Service, Accountability, Integrity, Growth and Innovation

**Smith Barney** 04/2003 – 03/2009
New Albany, Indiana
*First Vice President – Wealth Management*
Area of Specialization: Working with Entrepreneurs and Family Business Owners

- Responsible for identifying the initial strategic partnership opportunity and creating a business plan
- Launched and led the *Smith Barney Investment Center at Your Community Bank*
- Simultaneously merged Heritage Financial Services, a wholly-owned subsidiary of Your Community Bank
- Team revenues grew from $250,000 in 2003 to more than $2 million in 2008
- Assets under management grew from $40 million to $275 million in the same time period

## Entrepreneurial Endeavors

**Snow & Scott Enterprises, LLC d/b/a *DigiJump™*** 06/2002 – Present

*Managing Partner, Co-Founder*

- Managing a project involving electrical engineers, mechanical engineers, and design engineers, exercise physiologists, physical therapists, occupational therapists, and athletic trainers
- Completed a dramatic redesign and introducing a polished, user-friendly, touch screen interface
- Sourcing components and finding quality manufacturers in China through a strategic partner

**Meaning & Purpose, Inc. d/b/a *LegacyIt™*** 09/2007 – 12/2014

*Chairman of the Board, Co-Founder*

- Developed a strong brand identity and key messaging from scratch
- Took a completely cloud-based solution to the market long before it was widely adopted
- Attracting over $2.0 million in private capital investment (over 90% from 7 stakeholders)

## Professional Distinctions

*Certified Private Wealth Advisor®*

**Investment Management Consultants Association®** – Greenwood Village, CO

As the premier credential in this arena, the CPWA® certification program provides a challenging educational experience focused on behavioral finance, planning for closely held business owners, risk management and planning for executives.

*Fellow, Advanced Certificate in Family Wealth Advising, and Family Business Advising*

**Family Firm Institute** – Boston, MA.

The Family Firm Institute provides a global forum for practitioners and academics to acquire exemplary interdisciplinary knowledge while engaging in collaborative opportunities that facilitate their professional and business development objectives.

## Noteworthy Presentations & Peer Recognition

*Master Class Lecturer* – Family Business Australia: **Next Chapter® Planning** 09/2019

I was asked to present again on the strategic, transition, and succession planning process that I have developed. The global audience included practitioners, tax and legal professionals, strategy and management science experts.

*Presenter* – FFI GEN Alumni Series Webinar: **Next Chapter® Planning** 01/2019

I was asked to present again on the strategic, transition, and succession planning process that I have developed. The global audience included practitioners, academics, tax and legal professionals, strategy and management science experts.

*Co-Presenter* – Barron's Top Advisory Teams Summit, Las Vegas, Nevada 02/2017

**Succession Planning:** Utilizing The Next Chapter™ Approach

*Presenter* – FFI Fellows Webinar: **Introduction to Next Chapter™ Planning** 07/2016

One of only 4 Fellows Webinars offered each year, I was asked to present on the strategic, transition, and succession planning process that I have been developing. The global audience (approximately 12 countries and 5 continents represented) included practitioners, academics, tax and legal professionals, strategy and management science experts.

*Guest Lecturer – Entrepreneurial Journeys, Mistakes and Legal Agreements* 12/2016

L311: Law for Entrepreneurs, **Kelley School of Business**

Developed a presentation which shared my journey with both DigiJump™ and LegacyIt® as it related to the entrepreneurial process, the timing of legal agreements that we entered into, and the efficacy thereof.

## Education

**Thunderbird School of Global Management**
*MBA- Global Management, European Cohort*
Geneva, Switzerland
***Elected Class Speaker**, Graduated With Distinction*
*Field studies in China & Brazil*
GPA: 3.91
Honor Societies: *Beta Gamma Sigma and Pi Sigma Alpha*

**Indiana University**
*Bachelor of Arts* - English
*Minor:* History
Bloomington, IN
*Overseas Study in Austria*
GPA: 3.22

**Graduate Institute**
Executive Certificate – International Economic Relations
Geneva, Switzerland
GPA: 3.82
Thesis Paper: *Game Over – Loss of the Dollar's Reserve Currency Status*

## Community Service

**Family Business Center at the University of Louisville -** *Advisory Board* 2008 – 2016
*Past Advisory Board Chairman, Chairman* – Governance Committee (Currently)
The Family Business Center at the University of Louisville (College of Business) is one of the oldest and most-respected Family Business Centers in the country. Originally established in 1993, the Center addresses a multitude of challenges faced by closely-held and family firms.

**One Southern Indiana –** *Board of Directors* New Albany, Indiana 2008 – 2014
*Chairman of the Board*, *Chairman*-Business Resource Council Committee, *Chairman* – CEO Search Committee
One Southern Indiana provides business resources, national award-winning economic development, and government advocacy for businesses throughout the Greater Louisville – Southern Indiana Region.

**Bridgepointe Goodwill** *Board of Directors* Clarksville, Indiana 1999 – 2007
*Chairman of the Board*, *Secretary*, *Treasurer*
Donations to Goodwill stores are used to help subsidize the cost of a children's learning center, job placement and employment services, as well as funding family support services.