

## Expert commentary for journalists.

Scholar Financial Advising provides timely, quotable insight on wealth management, executive compensation, tax strategy, retirement, and the complex financial decisions facing executives, physicians, business owners, and multigenerational families.

**\$2.3B+**

Assets Advised in 2025

**190+**

Media Placements

**85+**

Outlets Worldwide

**40+**

States Served

### FEATURED IN

Bloomberg · Barron's · MarketWatch · Yahoo Finance · CBS News · Forbes  
Kiplinger · Investopedia · Nasdaq · Financial Planning · CNBC · U.S. News



### ABOUT THE FIRM

Scholar Financial Advising is a flat-fee fiduciary wealth management firm serving high-net-worth families nationwide. What distinguishes the firm is its team of advisors, which includes finance professors, PhDs, and experienced practitioners who regularly help clients navigate complex financial decisions.

Beyond advising clients, the firm's experts are experienced communicators. Scholar advisors regularly speak to professional audiences, host and contribute to the Scholar Wealth Podcast, and provide commentary for national media outlets. Their combination of academic expertise, practical advisory experience, and ability to explain complex financial topics makes them trusted sources for journalists covering wealth management, retirement, tax planning, executive compensation, and family wealth.

### AREAS OF EXPERTISE


-  Markets & the Economy
-  Business Owner Planning & Exits
-  Concentrated Stock Positions
-  Liquidity Events & IPO Planning
-  Retirement & Financial Independence
-  Estate & Wealth Transfer
-  Tax Strategy & Roth Conversions
-  Physician Finance
-  Charitable Giving & Philanthropy
-  Financial Planning for High-Net-Worth Families

### MEDIA INQUIRIES

To arrange an interview, guest appearance, or request a quote, please get in touch.

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