

# Scooter Thomas, ChSNC<sup>®</sup>, CFP<sup>®</sup>, ChFC<sup>®</sup>

## Associate Advisor

stthomas@bridgeworthfinancial.com  
205.208.8662 — Birmingham, AL

*"I enjoy the personal relationships inherent in Wealth Management and thrive off of its unique challenges and opportunities."*

Scooter began his working career as an Officer in the United States Marine Corps. Upon transitioning to the reserve forces in April of 2017, he knew that his next endeavor had to be just as meaningful. He began a career in financial advising and has not looked back. As an Associate Advisor, Scooter spends time gathering data, discussing goals, and providing advice to clients of the firm as a part of the larger Bridgeworth team. In his current role, he also assists senior advisors and partners in the preparation and presentation of more complex planning problems.

Scooter maintains his affiliation with the Marine Corps Reserve and currently serves as a Major in the Current Operations section of Marine Corps Pacific Command. Scooter and his wife Megan happily reside in Mountain Brook with their daughter Evie and two dogs, Lettie and Macy. Scooter is proud to help Veterans of Alabama be recognized by serving on the board of the Alabama Veterans Memorial Park, while also being actively involved as the finance chair of the board for the Birmingham Council on Foreign Relations. He is also serving as the President of the Birmingham chapter of the Hampden-Sydney alumni club and has recently joined the Monday Morning Quarterback Club.



### HONORS

- Navy and Marine Corps Commendation Medal, 2021
- Birmingham Business Journal Veteran of Influence, 2021
- Navy and Marine Corps Achievement Medal, 2017

### AFFILIATIONS

- Monday Morning Quarterback Club; 2023 - Present
- Hampden-Sydney Alumni Club; Member 2012- Present, President 2020 - Present
- Alabama Veterans Memorial Park Board member 2022 – Present
- Birmingham Council on Foreign Relations; Member 2022-Present, Board Finance Chair 2023-Present
- United States Marine Corps; 2013 - Present
- Rotaract Club of Birmingham; 2017 - 2022
- Altamont Alumni Association; Board Member 2018 - Present, Treasurer 2020 - 2021
- Mitchell's Place Junior Board; 2018 - 2020

### EDUCATION

- Hampden-Sydney College, 2012, Bachelors of Arts in Religious Studies (Islam)
- Chartered Special Needs Consultant®, 2020
- CERTIFIED FINANCIAL PLANNER™, 2023
- Chartered Financial Consultant®, 2023