



FOR IMMEDIATE RELEASE

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### STRATEGY BASECAMP ANNOUNCES ADDITION OF SCOTT SPENCER AS MANAGING PARTNER

*The firm will now offer its business planning, project management, and technology consulting services to financial advisory practices, in addition to its existing focus on financial services firms such as national independent broker dealers and investment advisors.*

Austin, Texas, May 15, 2014 – [Strategy Basecamp](http://www.strategybasecamp.com), a business and technology consulting firm focused in the financial services industry, has named Scott A. Spencer as a new Managing Partner. Scott will lead the firm's services for Financial Advisory Practices. Dodd McGough stated "Scott is a creative and resourceful professional that brings an additional perspective to the firm's overall offerings. He has a broad base of experience that provides depth to how we go about assisting our clients, whether they be national BD/IAs, financial advisory networks, or independent financial advisory practices."

Scott was most recently a Principal in a large financial advisory practice providing independent investment management and wealth planning solutions to individuals, professionals, and businesses. His prior experience includes roles as the head of Practice Management at a national independent BD/IA, as a sales supervisor for a national independent BD/IA and various roles involving sales, operations and business planning. He has held various registrations including FINRA's General Securities Principal (24) and is an Accredited Investment Fiduciary (AIF).

With the addition of Scott to the firm, Strategy Basecamp will offer services focused on the growth and success of Financial Advisory Practices. Scott will lead this client segment of our business. Services offered include business planning (such as marketing or moving to a fee-oriented business model), IT consulting (such as vendor selection or technology assessments via Strategy Basecamp's IT Diagnostic Service) and practice management (staffing, bonus plans, succession, etc.). He will also assist on institutional projects at broker dealers and/or investment advisors in the areas of project management, risk management and strategic planning.

Paul Osterberg stated, "Scott is a hands-on executive with practical, real-world experience running and growing businesses. His addition will help us complete additional industry research and more importantly, to help more clients finish complex work than was previously possible."

Please contact Dodd McGough at (800) 276-8423 or [dodd@strategybasecamp.com](mailto:dodd@strategybasecamp.com) for more information.



## About Strategy Basecamp

Strategy Basecamp is a business and technology consulting firm focused exclusively in the financial services industry. We partner with executives and managers to facilitate effective business planning and help organizations competitively leverage technology for profitable growth. Strategy Basecamp provides various services focused on business (development, strategy, operations) and technology that address specific needs of financial services firms. These engagements can be one-time projects such as compensation systems, offering a new product line, reviewing clearing or custodial relationships or can involve ongoing engagements wherein we assist in various items across the firm's spectrum of needs on a retainer based program.

**BUSINESS PLANNING | PROJECT MANAGEMENT | TECHNOLOGY CONSULTING**