ARM | AGILE RETIREMENT MANAGEMENT®

Scott Sanborn, PMP®

Retirement Planner

About Scott

Scott applies the planning skills he developed during a 30-year career as a military aviator and intelligence officer to help people rock their retirement. His extensive experience in strategic planning, project management, financial planning, resource management, risk management, leadership, coaching, mentoring, and executive education/development are a natural fit for the ARM team.

What He Cares About Most

Traveling with his wife by RV to reconnect with family and old friends, meeting new friends and experiencing all this great country has to offer.

What He Enjoys

Fishing (and sometimes catching), watching Antiques Roadshow and any show with Jonathan Winters.

Why He Became a Retirement Planner…and How He Became Part of the ARM Team

In 2017, Scott and his wife Sandi were excited to begin a new adventure as he approached the end of his military career. However, they questioned whether they were ready to "Rock" Retirement or if Scott should work a few more years. Despite Scott's self-professed 30 years as a "student of personal finance," he hired Roger Whitney to assess their readiness to begin their retirement adventure.

Roger's analysis and methodology not only gave Scott and Sandi confidence, it also enabled them to imagine a retirement they would not have achieved on their own. So, off they went on a 3-year RV adventure across the US (with a couple of big trips to Europe along the way) followed by acquiring their dream home on a lake in Wisconsin.

Scott often reflected on how Roger's efforts gave them the permission to live a life they never would have allowed themselves and wondered if he could instill that same confidence in others. In 2019, he asked Roger to serve as a mentor in his quest to become a retirement planner. Scott built on his knowledge of personal finance and focused his further studies on the financial and non-financial aspects of retirement and estate planning. Roger recognized the value of Scott's military and project management background and the parallels to retirement planning. In 2021, Scott began working directly with Roger on a variety of projects and, in mid-2022, Roger asked Scott to become the lead flat-fee planner as part of the ARM team.

The Project Management Professional (PMP) is a registered mark of the Project Management Institute, Inc.

Education

- CFP® Certification Professional Education Program/Candidate for CFP® certification, College for Financial Planning
- Uniform Investor Law Exam Education Program, Securities Training Corporation
- Senior Executives in National and International Security, Harvard Kennedy School, Harvard University, Cambridge, MA
- Senior Fellowship, Center for a New American Security, Washington, DC
- M.S. National Security Strategy, National Defense University, Washington, DC
- M.S. Information Technology (w/honors), Webster Univ, St Louis, MO
- B.S. Mathematics, University of Iowa, Iowa City, IA
- An advocate of lifelong learning, Scott is currently completing additional coursework in the financial planning field.

Training and Certification

- Certificate in Financial Planning - College for Financial Planning
- Series 65 Uniform Investment Advisor Law Exam – North American Securities Administrators Association
- Project Management Professional (PMP®) certification – Project Management Institute
- National War College – Department of Defense
- Airline Transport Pilot – Federal Aviation Administration
- Master Army Aviator – United States Army

Experience

Lead Flat-Fee Retirement Planner (Agile Retirement Management®) (2022-present)
Helping clients imagine and live their best life with confidence through detailed retirement planning.

Project Lead (Agile Retirement Management®) (2022)
Led the effort to document and formalize the operating procedures and methodology of a financial planning firm specializing in retirement planning.

Project Lead (Rock Retirement Club ®) Long Term Care Decision Pod (2021)
Led the research and analysis for the development of an interactive decision aid to help individuals and couples determine the best options for funding long-term care for the Rock Retirement Club® - a subscription-based club that provides education,

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empowerment, and inspiration to make the most out of life for those nearing or in retirement.

Board of Directors, University of Iowa Army ROTC Alumni (2019 – present)
Leader in a non-profit organization supporting the University of Iowa's Army Reserve Officer's Training Corps cadets, cadre and alumni; lead the association's fund raising efforts; manage the association's LinkedIn presence.

Independent Consultant (2018-2021)
Provided technical and resource programming expertise on a variety of defense industry topics.

US Army Colonel (1987-2017)
Army Aviator and Military Intelligence officer with extensive experience leading high technology organizations focused on aviation, military intelligence and cyber operations; broad experience in planning complex aviation and military intelligence operations; extensive experience in financial management overseeing a $120M annual budget and providing fiscal oversight of projects worth over $5B; Most recent assignments: Chief of Staff, US Army Cyber Command; Commander, US Army Air Operations Group; senior advisor and staff officer during three Pentagon assignments including two nominative assignments to the Office of the Secretary of Defense; Senior Fellow at a national-security focused think tank; final military assignment as a faculty instructor at the US Army War College delivering masters-level academic courses and directing a special program focused on educating senior US government leaders on the formulation of US defense policy with special emphasis on the National Security Council.