

Scott Goldberg

President of Equity Planning Group



Contact Scott Goldberg

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Scott Goldberg serves as President of Equity Planning Group and is a Partner of Oxford Harriman Private Wealth Management. As a senior leader within the organization, he is responsible for guiding Equity Planning Group's investment philosophy and portfolio management process, helping ensure that clients benefit from disciplined research, thoughtful asset allocation, and evidence-based investment decisions.

With more than two decades of experience in wealth management and investment advisory services, Scott has dedicated his career to helping individuals, families, and business owners navigate increasingly complex financial landscapes. Since becoming an Investment Adviser Representative in 2000, he has developed a reputation for combining analytical rigor with a practical, client-centered approach to financial decision-making.

Scott plays an integral role in the firm's investment oversight, including market research, portfolio construction, security analysis, and trading execution. His commitment to fiduciary excellence, risk management, and long-term strategic planning helps clients remain focused on their goals through changing market and economic environments.

Known for his thoughtful leadership and attention to detail, Scott works closely with clients to develop customized investment strategies designed to align with their objectives, risk tolerance, and overall financial plan. He believes that successful wealth management is built on trust, transparency, discipline, and enduring client relationships.

A native of West Bloomfield, Michigan, Scott was raised in the Farmington Hills area and graduated from Michigan State University in 1999.

Outside of his professional responsibilities, Scott enjoys traveling, following college football, listening to music, playing pinball, and spending time with family and friends.

Advisory services offered through Oxford Harriman Private Wealth Management.