Personnel

Internal Staff

Scott MacKillop
CHIEF EXECUTIVE OFFICER

Scott has worked in the financial services industry for 40 years. He began his career in 1976 as a lawyer in Washington, DC, focusing on securities law, ERISA and venture capital transactions.

In 1992 he joined one of his clients, ADAM Investment Services, an Atlanta-based investment management firm serving independent financial advisors. He became president in 1997.

In 1997 ADAM was acquired by Portfolio Management Consultants (PMC), a Denver-based firm serving independent financial advisors. Scott became president of PMC in 1998.

In 2000 Scott founded Trivium Consulting, a firm that helped over 50 financial institutions and asset management firms develop investment management services for financial advisors.

In 2004 Scott joined Houston-based US Fiduciary, one of his consulting clients, as president of its asset management division, which served independent financial advisors.

In 2007 Scott joined Sheridan, Wyoming-based Frontier Asset Management as its president. Frontier provides investment management services to independent financial advisors.

In 2015 Scott founded First Ascent Asset Management. First Ascent is based in Denver and provides investment management services to independent financial advisors.

Scott has published over 80 articles and spoken at over 100 conferences on a variety of topics.

Scott received a BA from Stanford University and a JD (with honors) from George Washington University. He currently holds a Series 65 license.

Karen Garcia
CHIEF OPERATING OFFICER

Karen has worked in the financial services industry for 34 years. She began her career in 1982 as an Operations Manager at Merrill Lynch, working in both Denver and New York City.

In 1987 she joined Directed Equity in Boulder, CO as a CTA Assistant where she was responsible for trade execution and technical charting for a commodity trading advisor.

In 1987 she joined Stuart-James Investment Bankers, Inc. in Denver as a Regulatory Compliance Manager and Client Service Manager.

In 1991 Karen joined Charles Schwab and Company in Denver as an Investment and Securities Employee Trainer and Marketing Registered Representative.

In 1992 she joined Portfolio Management Consultants (PMC), serving in various positions, including Director of Product Management and as an Executive Committee member.

In 1998 Karen became a founding partner and Managing Director of Denver-based Investment Consulting Group, a firm that provided investment services to independent financial advisors.

In 2003 Karen joined First Western Financial, a Denver-based bank, trust and investment management firm. Most recently she served as an Executive Vice President, Chief Risk Officer, Chief Compliance Officer and a member of the Executive Management Committee.

Karen received a BS in Business Administration from Regis University. She currently holds a Series 65 license and has previously held FINRA Series 7, 8, 24 and 63 licenses.

Patrick Krulik, CFA
CHIEF INVESTMENT OFFICER

Patrick has worked in the financial services industry for 11 years. He began his career in 2005 at Mount Yale Capital Group, where he served as an investment analyst.

In 2007 Patrick joined Envestnet/PMC. He served in various positions at Envestnet/PMC, including positions in product and portfolio management and had product management responsibility for PMC’s proprietary investment management programs and initiatives.

Most recently, he served as Senior Vice President, Portfolio Management, where he was responsible for developing and managing various discretionary portfolios for clients.

Patrick received a BS in Business Administration from the University of Colorado and is a CFA charter holder.

Malcolm MacKillop
DIRECTOR OF ADVISOR CONSULTING

Mac has worked in the financial services industry for 5 years. He began his career in 2011 at the Credit Union of Colorado, serving in various positions, including Senior Loan Officer and Member Representative. Mac was selected to participate in the Emerging Leaders Academy.

In 2014 he joined Frontier Asset Management. At Frontier he served in various positions, including, most recently, as a Regional Sales Consultant.

Mac received a BA in English from the University of British Columbia and a MBA degree from the University of Colorado.

Katherine Clark, CFP®
DIRECTOR OF ADVISOR CONSULTING

Katherine started her career in financial services over 10 years ago at a Texas bank. Connections there led to Manhattan and New York Life's broker-dealer. New York Life then offered her the opportunity to help build a team back in her hometown of Austin.

During business school, she started working for a boutique asset manager before graduating and joining an Austin-based independent RIA. First Ascent welcomed Katherine in 2017.

Katherine received a BA from Texas A&M University in 2006 and an MBA from St. Edward's University in 2013.

Travis Nelson
DIRECTOR OF CLIENT SERVICE AND OPERATIONS

Travis started in financial services over 11 years ago at CDF Capital where he worked as a Loan Analyst managing loan participations with third party capital pools and construction loans.

In 2011, Travis joined First Western Financial where he held several roles, most recently, managing the Trust and Investment Management operations team.

Travis joined First Ascent in the first quarter of 2017.

Ben Sullivan
DIRECTOR OF COMMUNICATIONS

Ben began his professional career in 2006 in audio-visual production, serving as the Media Director at a large church in Denver.

In 2008 he joined WorldVenture, an international mission agency based in Littleton, CO, as a project manager in Marketing Communications.

In 2010 he joined the Sanctuary Downtown, a Denver-based church, as the Director of Communications.

In 2012, started working as a Digital Marketing Specialist for ION Geophysical, a seismic technology company based in Houston.

In 2013 Ben founded a non-profit video production company called Novel Motion Pictures. At Novel, he produced nearly a dozen short films for foundations and charities nationwide.

Ben joined First Ascent in November of 2015. He produces all of the firm's video productions, manages its social media strategy and websites, and assists with the design and development of all of the firm's marketing materials.

Ben received a BA degree in English, with a concentration in writing from Colorado Mesa University in 2005.

Teresa MacKillop
OPERATIONS MANAGER

Teresa has had a diverse career that includes 10 years in the financial services industry.

In 2004 she joined US Fiduciary as Executive Assistant to the President/CEO. Then in 2006 she joined the Credit Union of Colorado as Executive Assistant to the CEO, serving until 2014.

Teresa has also served as the Executive Assistant to the CEO/President of Denver-based Dumb Friends League (one of the country's largest animal shelters), the CEO of Memorial Hermann Children's Hospital (Houston), the CEO of HCA West Houston Medical Center and in various administrative positions with M. D. Anderson Cancer Center and Texas Children's Hospital. She also served as Program Coordinator for Children's Miracle Network (Houston).

Independent Investment Committee

Mary Kathryn Campion, Ph.D., CFA, AIFA, President and Founder, Champion Capital Research.
Dr. Campion has decades of experience as a financial economist and portfolio strategist.

Geoff Selzer, CFA.
Geoff has 18 years of financial services industry experience. He has served as a Senior VP at Envestnet/PMC and as Director of Consulting Services at Prima Capital.

Shane Morrow, CFP®, CIMA, CAIA, CFA Level II candidate.
Shane has 12 years of financial services industry experience. He is Managing Partner of IronBridge Wealth Counsel.

Merrill Stillwell, CFA, Managing Partner, Blue Mountain Investments.
Before founding Blue Mountain Investments, Skipp was an analyst at Denver Investments from 2010-2014.