



Helping Clients Reach Their Financial Goals For Over 35 Years

2020

**Indianapolis Monthly Faces of Wealth Management Team Recognition
Forbes Top Women Wealth Advisors- Erin Pentz**

2019

**Indianapolis Monthly Faces of Wealth Management Team Recognition
Indianapolis Business Journal Fast 25 Award Team Recognition
Forbes Best-in-State Wealth Advisors: Scott Holley and Patrick Morrow
Barron's Top Women Advisors Summit : Erin Pentz
Forbes Top Next Gen Best-in-State: Erin Pentz**

2018

**Indianapolis Monthly Faces of Wealth Management Team Recognition
Forbes Best-in-State Wealth Advisors: Scott Holley and Patrick Morrow
Barron's Top Independent Advisor Summit: Scott Holley and Patrick Morrow
Five Star Wealth Manager Award: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen
Forbes Top Next Generation Wealth Advisors List: Erin Pentz
Barron's Top Women Advisors Summit: Erin Pentz**

2017

**Indianapolis Monthly Faces of Wealth Management Team Recognition
Forbes Best -in-State Wealth Advisors: Scott Holley and Patrick Morrow
Barron's Top Independent Advisor Summit: Scott Holley and Patrick Morrow
Five Star Wealth Manager Award: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen
Forbes Top Next Generation Wealth Advisors List: Erin Pentz
Barron's Top Women Advisors Summit: Erin Pentz**

2016

**Barron's Top Independent Advisor Summit: Scott Holley and Patrick Morrow
Five Star Wealth Manager Award: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen
Barron's Top Women Advisors Summit: Erin Pentz**

2015

**Barron's Top Independent Advisor Summit: Scott Holley and Patrick Morrow
Five Star Wealth Manager Awards: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen
Barron's Top Women Advisors Summit: Erin Pentz**

2014

**Barron's Top Women Advisors Summit: Erin Pentz
Five Star Wealth Manager Awards: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen**

2013

**Barron's Top Women Advisors Summit: Erin Pentz
Five Star Wealth Manager Awards: Scott Holley, Erin Pentz and Carson Shadowen**

2012 - 2011

Five Star Wealth Manager Awards: Scott Holley, Patrick Morrow, Erin Pentz and Carson Shadowen

