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INDIANAPOLIS FINANCIAL PROFILES

# Financial Empowerment

With education, compassion, and transparency at its core, SBC Wealth Management helps clients spend less time worrying about their finances and more time living life to its fullest.

**W**hen a patient goes to a surgeon, they don't need to understand the intricacies of the procedure, but they do need to understand their options, risks, realistic outcome, and, most importantly, that they can trust the physician is someone who is working for their best interest.

The same can be said of wealth management. What's often an intimidating topic is made approachable by the advisors behind Indianapolis' SBC Wealth Management, as they welcome clients with warmth and transparency to help them create, enhance, and preserve their wealth through informed decisions tailored to their lifestyle.

"We realize that financial concepts and strategies are complicated and can cause anxiety," says Erin Pentz, AWMA<sup>®</sup>,

wealth advisor, vice president, and co-COO. "We want to empower clients to make better financial decisions by serving as their guide, educating them through stories and metaphors based on their interests and understanding."

"People don't care what you know until they know that you care," adds Carson Shadowen, AWMA<sup>®</sup>, wealth advisor, president, and co-COO. "We don't launch into the relationship overwhelming them with the technical aspects. We want to listen and understand them first. Once they know that we're invested in them as a person, we can move forward building trust throughout the entire process."

Getting to know clients personally and showing that the team has their best interest at heart as fiduciary advisors earns SBC Wealth Management the trust to have difficult conversations with clients, whether educating a newly widowed spouse or telling someone that their

CELEBRATING

**40**  
YEARS



SBC WEALTH  
MANAGEMENT

IN BUSINESS

retirement is a few years further out than they think. Conversations like these aren't easy but are spoken with compassion and honesty.

"No one cares about their personal financial situation like they do," says CEO Patrick Morrow, ChFC<sup>®</sup>, wealth advisor. "I want us to be a close second, helping clients navigate their financial plans so that they can make the best decisions based on their circumstances and goals."

## The First 40 Years

When Scott Holley founded SBC Wealth Management in 1983, he wanted to build an enduring enterprise that could touch lives with a client-centric culture for generations to come. Since then, the firm has not only met many of his most ambitious goals—it has exceeded them.

Now run by a team of six shareholders, the firm continues to embody an ambitious vision to touch lives by helping clients create, enhance, and preserve their wealth.

"I have so much pride for this team," says Holley. "I'm proud of where we're at and excited to see what we're going to accomplish. We have the right leadership in place to continue growing SBC Wealth Management into an even more impressive organization over the next 40 years and beyond."



FROM LEFT TO RIGHT, IN BACK: Andrew Hancock, CIMA<sup>®</sup>, Wealth Advisor; Andrew Fairman, CFA, CFP<sup>®</sup>, Chief Investment Officer; Shanna Monroe, FPQP, Wealth Advisor; Sarah DeCamp, Wealth Advisor; Matt McBroom, CFP<sup>®</sup>, Wealth Advisor; and Kevin Sasena, ChFC<sup>®</sup>, Wealth Advisor. FROM LEFT TO RIGHT, IN FRONT: Carson Shadowen, AWMA<sup>®</sup>, Wealth Advisor, President, Co-COO; Patrick Morrow, ChFC<sup>®</sup>, Wealth Advisor, CEO; Scott Holley, Wealth Advisor, Founder, Former CEO; and Erin Pentz, AWMA<sup>®</sup>, Wealth Advisor, Vice President, Co-COO.

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