In times of uncertainty, the answer to these simple questions is often what we seek the most.

The team at SBC Wealth management is here to help you find those answers. Our mission is to position you to live the life you really want. The most important thing to us is what is most important to you. When the markets, the economy, or life altering events deliver an unexpected challenge, we are there to make sure you make it through. We have consistently demonstrated the ability to assist clients in the creation, management, and preservation of assets to be able to meet their lifestyle objectives.

HOW WE DO IT

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MISSION VISION

At SBC Wealth Management, our mission is to position our clients to meet their financial and lifestyle objectives while adhering to the very highest fiduciary standards. When the markets, the economy or life altering events deliver an unexpected challenge to our clients, we are there to make sure they make it through.

Who We Are

We know that the needs of our clients are too diverse for any one or two advisors to satisfy on their own. The wealth management team at SBC has many decades of multigenerational wealth management experience. The hallmark of the team is true dedication to our client’s financial and lifestyle desires with professional and personalized service. As a registered investment advisor we adhere to the highest fiduciary standards and are committed to our client’s success.

OUR PROCESS

What We Do

Retirement and Distribution Planning

The days of the gold watch, pension and post retiree health care benefits have become a distant memory. Coupled with the complexity of markets and financial products, the need for a comprehensive retirement plan has never been greater. Creating and managing sustainable income streams have become one of the most crucial pieces of the retirement puzzle to provide a comfortable, enjoyable, and stress free retirement. The professionals at SBC Wealth Management have been helping clients both create and preserve their wealth for many decades so they can sleep well at night and live the retirement lifestyle they deserve.

→ Forecasting for Retirement objectives, Wealth Accumulation and Income Objectives

→ Income Sustainability and Tax Management Strategies

→ Employer Plan Allocation, Distribution and Rollover Planning

→ Annual Performance Monitoring & Evaluation

Personal Financial Planning

Reaching our financial dreams and goals is a daunting task in today's complex financial world. No longer can we rely on employer pensions for a successful retirement. The cost of college educating our children has risen to almost incomprehensible levels. The investment universe has become increasingly complex and confusing. To truly live the life we want we need the solutions to these and many other financial issues that present themselves along the path of life. The team at SBC is ready to help you figure out the most important things to you about the lifestyle you desire. We know without a properly prepared plan or roadmap it is quite difficult to achieve the success you really want. We will prepare a plan tailored for the life you want to live, and lay out a strategy to help you navigate the road ahead.

→ Detailed discussion of Personal and Family Lifestyle Goals

→ Personalized Cash Flow analysis

→ Risk Management analysis

→ Investment analysis

→ Projections for Retirement Planning

- Educational Funding strategies
- Implementation and Periodic Review

Investment Advisory Services

The investment landscape has changed dramatically in the last few decades. Technology, Global economies, and sheer size of investment markets have led to much more volatility which in turn creates more concern and apprehension by investors today. SBC's investment committee led by Andrew Fairman CFA and SBC's CIO, makes every attempt to develop portfolio models and investment strategies specific to your needs that are designed to create and protect your lifestyle goals. We also strive to provide clarity, education, and a full understanding of how these strategies will keep you on path to success so you can sleep well at night.

- Client Portfolio Management
- Research and Selection of Investments
- Online Portfolio and Resource access
- Implementation and Periodic Review of Recommendations

Estate and Legacy Planning

We spend a lifetime creating and managing our estate and yet too few plan for their desires to be carried out in the event of an incapacity or death. The complexities of ever changing tax laws, Trusts, markets and financial products can make planning for a potential incapacity or our after life financial objectives overwhelming. The team at SBC have helped hundreds of clients crystalize their objectives and make sure their assets end up with the family members important to them, and the charities, and organizations they care about when they are no longer here or able to make those decisions. At the same time making sure estate settlement costs are minimized and assets are protected.

- Complete Asset Valuation, Ownership and Beneficiary Review
- Recommendations and Analysis of Wills Trusts and other Legacy Documents
- Elder Care Strategies
- Estate Settlement Cost Minimization Strategies

- Implementation of Plan Recommendation and Periodic review
- Special Needs Strategies

Corporate Financial Education Workshops

SBC Wealth Management has been helping Corporate America reduce employee financial stress for over 30 years. The days of the gold watch, pension and post retiree health benefits are a thing of the past. Financial education in the workplace is more important today than ever before.

- Financial Planning for Executives
- Pre Retirement Planning
- Successful Retirement Strategies/Income Management
- Stock Option Strategies
- Managing income from 401k and Cash Balance Pensions
- Financial issues in Employment transition

FINANCIAL TOOLS

Recent News

May 06, 2019

Scott Holley and Patrick Morrow featured on Forbes 2019 Best-In-State Wealth Advisors List

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August 31, 2017

FORBES NAMES ERIN PENTZ ONE OF THE TOP NEXT GENERATION WEALTH ADVISORS IN THE COUNTRY

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April 18, 2017

Scott Holley and Patrick Morrow among “Best of Best” Financial Advisors attending Barron’s Top Advisors Summit

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Awards and Accolades

[Awards List](#) | [Indianapolis Monthly March 2017](#) | [2015 Five Star Wealth Manager Award](#) | [2014 Five Star Wealth Manager Award](#) | F

Founded in 1983, SBC Wealth Management was founded on the American values of hard work, integrity, and uncompromising quality. Our clients rely on us to create, enhance, and preserve their lifestyles.

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