that a client had been in a car accident. Mitch doesn't usually handle these types of situations, but he rushed to the accident scene.

"The first person she asked the police to call was me, her financial advisor," he explained with a laugh. "So I went to the accident to make sure she was okay. And then the guy whose car she hit asked me for a ride home!"

Anyone who knows Mitch wouldn't be surprised by these stories. "My main focus every day is investment management. But a lot of my day is also building relationships with my clients, their kids and their grandkids," he said. "My clients know how much I care."

DEEP WEALTH MANAGEMENT EXPERTISE

The Settle Group takes a unique approach to wealth management that's collaborative, holistic, and respectful of clients' needs and goals. Team members include Mitch, his partner and fellow Financial Advisor Shannon Raines, Senior Client Specialist Tara Estes and Client Specialist Jenny Wathen. The team also includes his 28-year-old daughter Sydney Settle, a Client Specialist.

Shannon holds a Chartered Retirement Plan Specialist (CRPS) designation, which means she's demonstrated required knowledge and expertise in working with retirement plans.

"We have our own in-house estate planners and certified financial planners that meet directly with our clients on my team. Shannon knows anything and everything about retirement plans, not only how to get the money invested, but working with a plan sponsor to help them invest their money and set up the plan. I've got another team member who has 25 years of experience in the financial services business who works primarily in fixed income strategies and annuities," he said.

Mitch believes your financial well-being shouldn't be something anyone has to worry about. Whether your goal is saving money for your child's education, preparing for retirement, buying a home, or building a business, The Settle Group can help you make important financial choices in life. To assist in these decisions, Mitch and his team rely on their skills and experience to understand your concerns and share your vision.

THEY HELP CLIENTS ADDRESS THE FOLLOWING CONCERNS:

- What is the likelihood that you will run out of money?
- If something unexpected were to happen to you, what are the chances you would leave your family financially the way you want?
- When it comes time to distribute your estate, will it go to whom you want, in the way you want, and in the most tax-efficient manner?
- How should you manage your investments and other financial resources to maximize the likelihood of achieving your goals?

Mitch says one thing sets him apart, beyond his professional credentials and years of experience.

"I've been in the business for 35 years, but I am as passionate today about work as I was 35 years ago," he said. "This is not just a job. It's a passion."

While Baird does not offer tax or legal advice, our Financial Advisors regularly work with clients' attorneys and tax professionals to help ensure that all phases of wealth management are addressed. Robert W. Baird & Co. Incorporated.