Build & Maintain Your Wealth

*by: The Settle Group:
Shannon Raines, Tara Estes,
Jenny Wathen, and Sydney Settle*

When clients turn to Baird's The Settle Wealth Group, they gain access not only to a team of dedicated advisors, but to the strength of an entire family of financial experts. "Between me and the other members of my team, we've got a combined 112 years of wealth management experience," said Mitch Settle, a Managing Director at Baird and Financial Advisor of The Settle Wealth Group. "We're a very experienced staff that works with a lot of high-net-worth individuals in three different areas, including retirement planning, financial planning, and estate planning."

Mitch began his career at Hilliard Lyons in 1986 working with his father, Roy Settle. Continuing the tradition of excellence, Mitch developed The Settle Wealth Group, a team of licensed and trained professionals to assist him in his mission of helping clients build and maintain wealth.

Mitch has been listed as one of the "Top 1200 Financial Advisors" in Barron's magazine for 10 consecutive years, as well as one of the "Top 3 Financial Advisors in Kentucky." In addition, he's been ranked by the Financial Times as one of the "Top 400 Advisors" in America. Most recently, Mitch was named to the Forbes Best-in-State Wealth Advisors for 2019 and 2020, ranked as #3 in Kentucky last year. He holds the Chartered Wealth Advisor® (CWA®) designation, which is awarded only to Baird Financial Consultants who have completed an extensive program concerning the varied aspects of wealth management. He was a member of the Hilliard Lyons CEO Council (which included the top 3% of Hilliard Lyons producers) every year since 1990 until the firm's acquisition by Baird in 2019.

The Settle Group's objective is to build strong, long-term relationships and provide integrity, commitment and trust to every client experience. Mitch and his team help clients transition wealth from one generation to the next, guiding parents or grandparents in setting up and working with Hilliard Lyons Trust Company, and assisting the next generation in managing their inheritance.

CARING FOR CLIENTS BEYOND MONEY MATTERS

One of Mitch's most memorable moments as a Financial Advisor actually had nothing to do with wealth management.

It started on a rainy Mother's Day a few years ago, when he checked on a long-time client at her home near his office in Owensboro, Kentucky. When he rang her video doorbell, he noticed a strange scene: Inside the house, the TV was on and the dog was barking, but she wasn't answering the door. Suddenly, his cell phone rang. It was the woman's daughter calling from several states away, where she was watching him on the video feed from her mother's doorbell.

"When I told her that her mom wasn't opening the door, she panicked. She gave me the code to the door and I called the police," said Mitch.

When the police arrived, they discovered his client had fallen the night before and spent 15 hours immobile on the kitchen floor.

"I got on my knees and started telling her everything was going to be okay," he said. Fortunately, she made a full recovery. She and her family are still clients today.

Another time, he got a call from a police officer who informed him