

As parents to a toddler and preschooler, Tom and Hannah are used to having their hands full. But the demands of family life and work leave very little time to focus on financial planning, much less ensuring their investments align with their faith. So when the couple learned about Biblically Responsible Investing and discovered that, MK, in particular, specializes in this values-based approach, they felt they'd found an advisor who could help them put their financial house in order.

"We have a 401(k) and have always put some money away," Tom says. "Neither of us really knew what we were doing, though. And unfortunately, we both know people who have been burned by financial advisors."

Hannah agrees. 'I was initially skeptical about working with an advisor. But after meeting with the team at SWM, their philosophy resonated with us. We connected particularly well with MK, and we quickly discovered that she has the heart of a teacher.' (As a former educator herself, Hannah knows a teacher when she sees one!)

"No question is a dumb question with MK," Tom adds. "She's generous with her time, breaking things down in a way that makes sense to us. And we appreciate how she seamlessly brings in the expertise of other advisors at SWM when needed."

Learning from MK has been transformative. "I know so much more about finances than I did three years ago," Hannah says. "Now she's helping us with everything from 529 plans for our children's education to guidance on life insurance and estate planning. As we grow and our assets grow, we definitely plan to leverage more of the firm's offerings."

Most importantly, the couple is grateful to be working with an advisory team that understands aligning their financial goals with their faith.

"What we have is not really ours. God has given us everything," Hannah reflects. "Money is not always a mere math problem. It's a way you can have an impact in the world and invest in companies that are doing good things for people."

Today, when Tom and Hannah are chasing their kids around the house, they're not stressed about finances. They have confidence in their financial future and the peace that comes from being good stewards, leaving them free to enjoy every precious moment with their little ones.

Relationship to SWM: Clients since January 23, 2023

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